

Publishing and marketing Lebanese children's books in the Arab world

Shereen Kreidieh (2015)

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The Publishing and Marketing of Lebanese Children's
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Shereen Kreidieh

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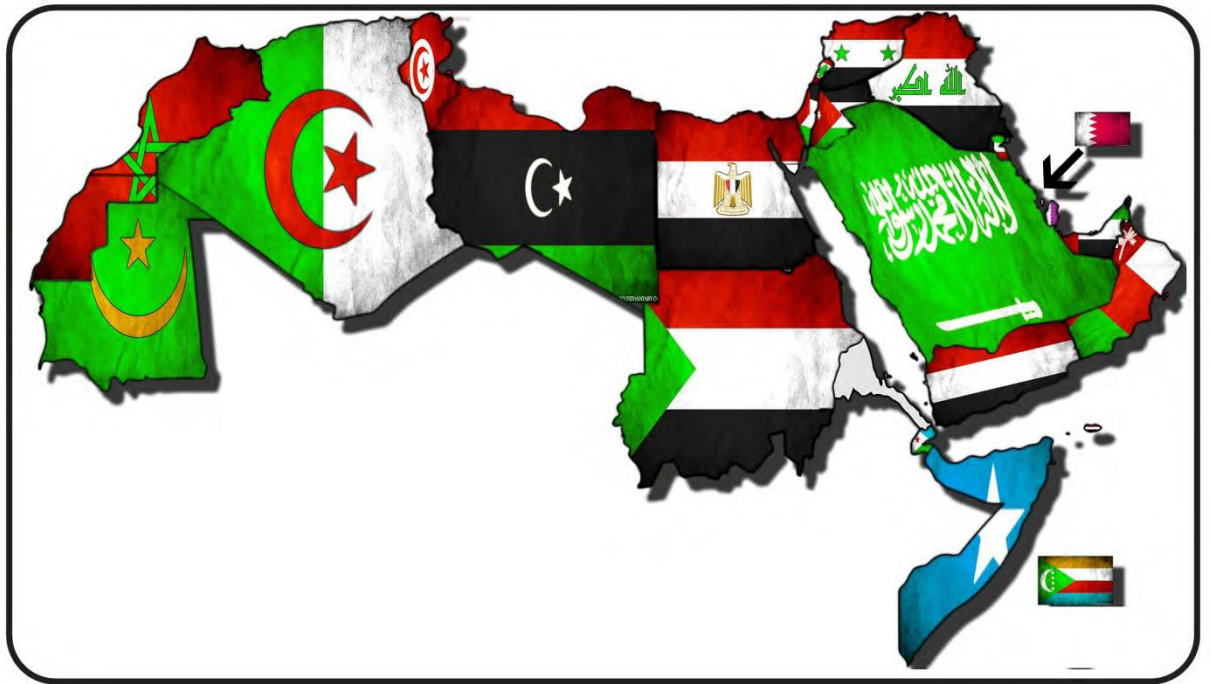
**The Publishing and Marketing of Lebanese Children's Books
in the Arab World**

The core question this research seeks to answer is: how and why do the publishing and marketing of children's books in the Arabic-speaking World differ fundamentally from publishing and marketing in larger western children's books markets? In 2003, the Arab Human Development Report concluded that the Arab book is a "threatened species" (Rogan, 2004). A decade later, this assessment still resonates with Arab book publishers. Sophisticated marketing techniques are still conspicuously absent from the Arabic book publishing industry, and in need of further development. Marketing and market research drives publishing in the West, and advocates the love of books to customers (Squires, 2009, pp. 40-69), (Baverstock, 2008, p: 1), (Bogucki, 2012), (Blythe, 2009, pp. 6-8) while publishing in the Arab World is driven by different priorities.

To understand marketing Lebanese children's literature, given that Lebanon is regarded as the Arab World's publishing capital exporting 90% of its books, the research employs both qualitative and quantitative methods to collect data, provide a socio-cultural appreciation of the publishing industry, and address the factors affecting book development, customers, and markets. Publishing exists within a framework of influential factors shaping the industry, including legacy publishing houses and family-run publishing houses, mistrust between the different stakeholders in the book chain, and the socio-economic situation in Lebanon and across the Arabic-speaking World. An overview of the Lebanese children's book publishing houses reflects the traditional methods used to publish and market Lebanese children's books. Particular attention is given to the crucial role played by book fairs as the key sales channels across the region. A series of surveys demonstrates the importance of picture books for advancing literacy and language capacity among elementary school children as well as creating a love of the Arabic language. The uniqueness of Arab markets is demonstrated when marketing methods used in the UK are applied to the Lebanese market, with variable results. The research highlights the need to further develop marketing mechanisms for Lebanese children's literature and the need for greater comparative publishing research in the Arabic-speaking World.

The research adds to the body of knowledge on Arabic Children's book, drawing a clear picture of the publishing and marketing of children's books in Lebanon and across the Arabic-speaking World, offering practical ideas for other Lebanese publishers to work on, and introducing a combination of new methods to understand different players in the book chain process.

Introduction



The Arab World – Image 1

To date, very little research exists on the state of publishing in Lebanon, particularly children's book publishing. By exploring this uncharted territory, my research seeks to fill an existing gap in the literature. In so doing, it will provide greater knowledge and insights into the field of publishing and marketing children's books in Lebanon and across the Arabic language book market. The study aims to explore the factors affecting publishing and marketing of children's books in the Arab World, seeks to understand their customers, and identifies the marketing techniques needed to further develop the industry.

Marketing Lebanese children's books is essential to the development of publishing and promoting reading in Lebanon and the Arab World. In examining the publishing and marketing of children's books in the Arab World, this study seeks to determine why publishing and marketing of children's books in this region differ from larger western publishing markets.

The Arab World

According to the Arab Thought Foundation's (ATF) cultural development report, an average Arab child reads six minutes a year while an average Western child spends 12,000 minutes reading, and an Arab adult reads an average of a quarter page a year while an average American reads eleven books (Al-Yacoub, 2012). The reading statistics ATF presented highlight the fact that Arabs read less than people in the West.

The publisher-to-reader book chain is shaped predictably by reading patterns and habits in addition to other factors including distribution infrastructures. The more readers are available and keen to read, particularly in the children's publishing context, the more chances there are to sell more children's books or "young teen" books and develop the book industry by focusing on trends in niche reading markets.

The Lebanese Book and Reading Committee (BRC) stresses that reading in Lebanon is generally linked with five interrelated areas: family, school, publicity, governmental, and non-governmental institutions (2009, p. 34). The habit of reading starts at home, where family members can act as models in the practice of reading (BRC 2009, p. 35).

The low levels of reading in the Arab World is the result of many factors, most importantly the region's instability.

The Arab World has featured in the world's headlines, particularly since the 2011 Arab Spring political changes that continue to escalate across areas of North Africa and the

Levant. Continued economic development in the Gulf States also found its way into the news, with Qatar scheduled to host the World Cup and Dubai becoming a leading hub for international business. Despite differences, the Arab World is united by a common Arabic language. With 422 million speakers, Arabic is one of the ten most spoken languages in the world, and is the language of the Quran, the holy text for the world's 1.5 billion Muslims (Bokova, 2012).

Rapid economic advances in the area of the Arabian Gulf, and rapid change, crises and conflict in the Levant and the Maghreb areas of the broader Middle East draw global attention to the Arab World.

The region is attracting financial investment to the Gulf, and non-governmental organisations (NGOs) and relief organizations in other areas of the region. Greater attention to the disparity in levels of development in the region has demonstrated the role that education plays in development. Children's books are one of the mechanisms that can be used to bring about advancement in literacy and language. Informal education through children's books can indirectly support education and economic development and cultural change.

Rapid development escalated by international intervention and globalisation can create new unanticipated tensions and stresses on traditional cultures in the midst of transition. One of the ways to understand a culture is by studying what the next generation reads and learns from. A thorough understanding of what people in any given environment read is affected by studying what books are available to the child, and how these books are presented and distributed to them. As Pinsent argues, "[l]anguage and culture are almost impossible to separate, since the values of any group are inevitably associated with the way they speak about these values" (1997, p. 109). Values and cultures are shared through children's literature, as well.

Why Study Children's Literature?

The need to study children's literature is rising to meet the needs of an increasingly changing Arab World, where literature is one of the main tools to help children in understanding themselves, their environment, and people from different ethnic, religious, national or social groups. Children's books can help children learn to understand and accept differences, and help children learn the skills necessary for building tolerance. The Arab World faces continuous conflicts arising from many sources, one of which is being

“scared” or “not accepting” the other. People fight because they differ in religion, sect, beliefs, or contradicting political ideas. People are dying, children are losing their loved ones, families are forced to leave their homes, and children are experiencing many traumatic experiences. The Gulf States are facing changes and rapid development in addition to the increased number of foreigners (to be discussed in Chapter Four). Children’s literature is an ‘important instrument’ in the process of changing the attitudes in a society, increases the flexibility of the mind (Holland 1968; 1989), and “play[s] a small but significant part in the process of making our society more equal” (Pinsent, 1997, p. 177).

Children’s literature is one of the main tools used to expose children to the concepts of “right” and “wrong”. For example, in Arabic folk tales the evil character is punished, while the good character is rewarded with a happy ending. Russell stressed the importance of children’s literature in promoting the development of morals, ethics, and values, where characters present excellent role models for good conduct (Russell et al., 2013, pp. 105-122). Adults tend to remember the stories that they were told and the stories they read as children, because they assist in establishing basic moral characteristics and understanding of others.

Bashour highlights the importance of children’s books in fulfilling psychological needs. These include the needs to feel secure, to find knowledge, beauty, and order, to escape reality into the story’s imaginative land, and to demonstrate their desire for accomplishment by associating themselves with the heroes, giving the readers internal push to face the obstacles and failures in life (2012, p. 8).

In her book, *The Power of the Page*, Pinsent (1993) stresses the importance of narrative for young readers, discussing children’s responses to stories. Pinsent acknowledges a host of prior research findings, including Tudge’s (1989) thoughts on the human enthusiasm to narrative arising from the need to understand how others behave, Meek’s (1982) belief in the use of stories to sort out the world, Bruner’s (1986) valuing the power of narrative in children’s cognitive development, Waterland’s (1992) points on the use of books in initially teaching reading, Humble’s (1993) attention to the power of books in helping children recognise the emotions related to traumatic experiences, the Kingman Report’s (1988) belief that reading is “essential to the full development of an ear for language”, and Tucker’s (1981) argument on children’s literature’s ability to allow “taboo feelings and fantasies” to be acted out (pp.1-5).

Pinsent stresses the “immense” power of the story in developing children’s language, literacy skills, psychological development, and emotional development (1993, p. 136). Stories are collected, written, and illustrated to be presented to children through children’s books.

Researching Children’s Book Publishing in Lebanon

There are very few statistics or studies that discuss book publishing and reading in the Arab World. Even in regional states like Lebanon and Egypt, historically known as the two main publishing centres in the Arab World, it is a struggle to find accurate data. The lack of data on publishing can be attributed to minimal interest in the topic by international academia, extensive piracy in the region, regional wars, and infrequent use of ISBNs (International Standard Book Number).

Despite recent progress in the field of publishing, such as changes in the e-book market, and world’s largest publisher Random House’s 2014 sales increase of one billion pounds with revenues up by 6% (Mattin 2015, p. 13) and “[t]he invoiced value of UK publisher sales of books rose 4% in 2012 to UK £3.3 bn with a 66% increase in digital sales” (*The UK Book Publishing Industry in Statistics 2012*, 2014), there remains an open question as to how Arab children’s book publishing has advanced and what factors (if any) have hindered that advance. This study will consider Lebanese children’s book publishing and marketing, and will not only draw on, but will also examine aspects (such as customers’ preferences and marketing techniques) that existing studies by the Arab Thought Foundation (ATF), Consultation and Research Institute (CRI), and the Book and Reading Committee (BRC) in the Ministry of Culture in Lebanon have not addressed.

Research to date tends to limit its scope to the general problems facing publishing, distribution, and reading promotion in the Arab World. For example, the ATF and the CRI studies examined publishing in general while providing minimal statistics about children’s book publishing. Najla Bashour briefly discussed the history of children’s book publishing in the Arab World, with a cursory review of the marketing and publishing elements of Arab publishing.

The data available about children’s books and publishing has a substantial impact on an industry’s development. For instance, publishers need to be aware of the titles published in Arabic, best-selling books, and successful marketing techniques in order for the publisher to build on them and develop their future lists and strategies. There is a considerable body of literature about the data deficit in the Arab World and the particular challenges that

influence Arab publishers' marketing methods. Yet, very little research relating to book publishing data can be found. Studies and journal articles have lamented the lack of statistics available and attempted to address the slow development of marketing in the Arab publishing industry and the lack of reliable data available (for example Wischenbart and Jarrous, 2012; Abu Dhabi Book Fair, 2014; Eschweiler and Goehler, 2010; Idriss, 2013). ATF similarly observes that "[t]here is an obvious lack of data and numbers and official statistics to learn about writing and publishing in scientific studies" (2010, p. 333). The fact that the Arab World's book market is spread across different territories adds to the challenge of collecting reliable statistics.

The Arab World Book Market

In the Arab World, the political environment, Arabic language, culture, religion, and the different education systems are all important variables influencing the marketing of children's books. When combined, these varying political, regulatory, linguistic and educational environments set the parameters for the children's book industry. For instance, Lebanon is highly unstable politically, yet it enjoys a freedom of expression which is reflected in books (discussed in Chapter One). Moreover, Lebanese people frequently speak another language in addition to Arabic, and development in the educational systems is limited to some private schools (also discussed in Chapter One). Egypt is also politically unstable. However, Egyptians do not have the same freedom of expression as the Lebanese, are mostly monolingual Arabic-speakers, and suffer from a slowly-developing education system. The Maghreb (Morocco, Algeria, and Tunisia) is greatly affected by its colonial history, especially with widespread use of the French language. Given the unrest in the Arab World which is volatile and ongoing, this thesis cannot address all the unrest happening and it will be limited to the period before 2015. On the other hand, most of the Gulf States are politically stable, their nationals speak mainly Arabic, and there is a tight control on publishing as well as on the books entering the market. However, in the UAE especially, education is developing rapidly.

In addition, there are numerous stakeholders involved in marketing children's books in the Arab World. Publishers, bookshop managers, parents and teachers, NGOs, and government ministries all play a part in determining which children's books are published by shaping demand. A children's book is produced under the umbrella of a publisher who markets and sells it to schools, to bookshops, and in Arab book fairs, where customers meet and interact with publishers and ultimately buy (or fail to buy) children's books. Publishing and marketing are to a certain extent similar throughout the Arab World, while in Europe

and the UK, the presence of wholesalers, large distributors, online sales venues, and supermarkets is very important.

Aims of the Research

This study will examine the practices of Lebanese children's book publishers and their customers across the Arab World. It will track developments in other parts of the world (particularly the UK), and apply marketing techniques in Lebanon to selected Arabic children's books order to provide new insights into how business models can change around the world. The research findings will assist in providing a greater understanding of the Arab children's book industry and its customers. The research seeks to contribute to the existing data on children's book publishing in the Arab World because it analyses publishing from both an academic and a business approach. As a participant observer – a researcher born and raised in publishing in the Arab World – I give the research an additional qualitative perspective. Comparing publishing and marketing in the Arab World to the UK provides the reader with a series of representative areas to better understand how developed and developing markets differ.

The Research

The research begins by summarising the available literature about Arabic children's books, then examines the methods employed, before moving to describe Lebanese publishing and publishers, and finally covers customers and marketing techniques.

Few scholars have thoroughly examined publishing in the Arab World. The **Literature Review** discusses the available research on publishing, distribution, and reading in the Arab World. It will provide a critical reflective view on the literature written on the different phases of publishing such as the author, illustrator, translator, and the publishing companies; and it will document research about the different ways to reach the consumer. The chapter will look at the problems surrounding publishing, as identified by the different researchers in the Arab World. The chapter will also assess the literature detailing the use of traditional and limited marketing techniques and distribution channels in the Arab World, the problems facing distribution in the Arab countries, and the reasons behind putting emphasis on book fairs as the main sales channels to the public.

In order to examine publishing and marketing in the Arab World, this project employed different methods, including both qualitative and quantitative procedures, outlined in the

Methodology. Minimal research is found in the Arab World about publishing, books, and readers since most government ministries, publishing unions, NGOs, publishing houses, book shops, and some book fairs do not generate their own statistics. This study will fill the gap by using questionnaires, interviews, fieldtrips, and experimenting with marketing techniques to generate statistics and data. Information about publishers will be gathered through a detailed questionnaire to obtain information about publishing houses' marketing techniques, markets, and future plans. Explaining the role of the Ministry of Culture in Lebanon, the role of NGOs, and the way that bookshops operate is one of the aims of the research, in addition to understanding children's book customers in different markets, mainly the major book fairs in several Arab cities. Fieldtrips are another method considered to understand how publishing houses and book fairs operate in both the UK and Arab countries. The research exposes and discusses the obstacles researchers face in this field, including, for example, female researchers' limited access to areas like the Kingdom of Saudi Arabia. Issues of gender and competition restrict the capacity of female researchers engaged in the publishing world to conduct comprehensive research unhindered. The research also seeks to understand the UK market and the different methods used to market books in the English language market, in addition to weighing the possibility and trying to apply some of the techniques in the Lebanese market.

This study is concerned with the main factors affecting publishing and marketing children's books in the Arabic-speaking World. It was noted that while in America "a sort of speed dating roundup of sales/marketing/publishing/design ideas [was] created to shake publishers up in their thinking about their publishing and sales" (Association of American University Presses conference 2012), signalling that the world of marketing and publishing is changing, the Arab publishing market remains stagnant and slow-moving. The aim of this research, therefore, is to determine why that market, and in particular the children's book sub-section, is distinct from other larger publishing markets. The research identifies the main factors affecting publishing and marketing children's books in the Arab World, as well as key publishing stakeholders, and then considers their impact on marketing and publishing policies. **Chapter One** considers the factors affecting children's book publishing in the Arab World. The external factors shaping the publishing industry include wars, political stability, and economic status.

In addition, the various Arab markets have an effect on what is published and the publishers themselves. The internal factors that need to be considered in detail include the

way the publishing houses are run and managed, how decisions are taken, the size of the publishing houses and the size of their print runs, and the titles the publishers work on.

Other factors such as the relationship between Lebanese publishers, authors, and illustrators are crucial, as are translation and translation funds, the mixed roles in the book chain, the weak network of trade associations in Lebanon and the Arab World, the lack of existing statistics and studies, the unstable political situation, the developing Arab business climate, the book chain, the outsized role that book fairs play, weak distribution networks, widespread piracy, the extensive regulations that governments have on books, and the slowly changing market. These factors combined will be discussed in detail in Chapter One, as will their effect on the development of the publishing industry in Lebanon and the marketing of children's books.

Publishers are one of the main providers and creators of children's literature. The methods and marketing tools publishers use to reach their customers is of great importance in understanding the markets and the customers. **Chapter Two** examines the Lebanese children's publishing industry through detailed questionnaires with Lebanese publishers. The chapter will study the questionnaire results that address information about publishing houses, their markets, marketing techniques, and future plans. Part one of the chapter will examine the difference in size between publishing houses in total number of employees, employees working in marketing, titles published, print runs, and specialty. Part one will also consider the children's book titles published and the availability of other titles in the publishing house. Part two of the chapter will consider the different markets that the publishers target and sell to, again displaying the differences between houses. The selling channels that the publishers use, including book fairs and distributors, will be discussed since the selling channels affect the marketing techniques used. Marketing techniques used in the UK like bookshop windows, television, and radio are rarely used mediums and the questionnaire will try to find out the number of children's book publishers in Lebanon who use these techniques and their effects. The chapter will also chart the main factors and obstacles that Lebanese publishers consider effective in book sales in the Arab World. The last section of the chapter will consider the Lebanese children's book publishers' future plans, including their future published titles, marketing techniques to be used, and considering new genres for publication. Lebanese children's book publishers market and sell books to both business customers, like bookshops and ministries, and to the individual customers in book fairs. Unlike products that are especially targeted for adults, children's books have distinct customers and consumers; they are purchased by adults (including parents and teachers), and used by children.

Lebanese children's book publishers predominantly sell through the book fairs organised in the major Arab cities, including those in the Gulf States. **Chapter Three** examines the children's book fair customers in different Gulf markets through a series of surveys. Visiting book fairs in five Gulf cities, Kuwait (Kuwait), Qatar (Doha), Oman (Muscat), and the UAE (Abu Dhabi and Sharjah) and interviewing customers will help in understanding the markets and the children's book customers. Each of the five sections in the chapter covering the book fairs will look at the general information about each country including the economic and the political status, where the country stands in terms of bookshops and public libraries, moving to discussing the results from book fair questionnaires and analysing the book fair's children's book customers. After each section, the typical customer is presented relying on the highest percentages of customer responses. The gender and age of the customer, age of the child, the genres of books intended to be purchased, and the reason behind purchase is specified in each book fair in order to help marketers address the market.

The Gulf States, being relatively stable and rich, are one of the main markets for Lebanese publishers, in contrast to the unstable markets in Lebanon and in the Maghreb. **Chapter Four** provides a comparative analysis of the study of Lebanon, Tunisia, and Algeria discussed through a series of questionnaires at the countries' book fairs. Section one of the chapter examined the Beirut International Book Fair, an important venue for Lebanese publishers to reflect their image and position in the market. These book fairs are usually affected by the instability in the countries unlike the other book fairs in the Gulf States. Section two will consider the Tunisian market which, like the other Maghreb States, is bilingual with a strong emphasis on French. Section three of the chapter will study Algeria, which has a large population but like Tunisia has low per capita income levels. In keeping with Chapter Three, the features of the mean or average customer in each of the book fairs will be detailed.

The findings from all the book fairs in Chapters Three and Four are combined and are analysed at length in **chapter Five**. Chapter Five is divided into four sections detailing the findings from Chapter Three and Chapter Four to better understand the behaviour of the Arab children's book customer. Section one will compare the Arab book fairs to international book fairs, stressing the different roles that the book fairs play in the markets and the book business. Section two will examine the results from the book fairs combined looking for a typical Arab World children's book customer. Section three will analyse the results from all the book fairs combined in order to identify links between variables in the

questionnaires. The results will look at some combination of variables including gender, teachers, children's ages, price, publisher, markets, mothers, and the reasons behind purchases. Section four of the chapter will compare the results from the Gulf States to those from the other markets (Lebanon, Tunisia, and Algeria). The chapter will end by highlighting the need to examine a developed children's book market (i.e. the UK).

This study considers the role and impact of children's book publishing and marketing in the Arabic-speaking world, focusing particularly on book fairs held across the region and comparing and contrasting these publishing and marketing particularities with those in the United Kingdom of Great Britain and Northern Ireland (UK). **Chapter Six** focuses on a consideration of the differences in marketing approaches between the UK, a developed market, and the Arab World, a developing one. Several marketing techniques, long tested and known to be successful in the UK, were trialled in Lebanon, using titles alongside a matching set of "controls" from Asala Publishers children's range.

The study concludes by summarizing the findings from the research chapters. Based on the findings, the second section considers the findings and limitations of the research. Section three considers the future of the children's publishing industry in the Arab World, and the implications of this work for future research.

The Frankfurt Book Fair document on the *Arab Book Market* ends by discussing the barriers to developing publishing structures, stressing that "[i]n this difficult market, publishers find it hard to develop their structure and grow" (Abou-Zeid, 2013). Researching the Arab children's book market, and examining both producers and customers, would increase the body of knowledge about this under-appreciated sector and help in developing the publishing industry in a crucial region.

Literature Review: Publishing in the Arab World

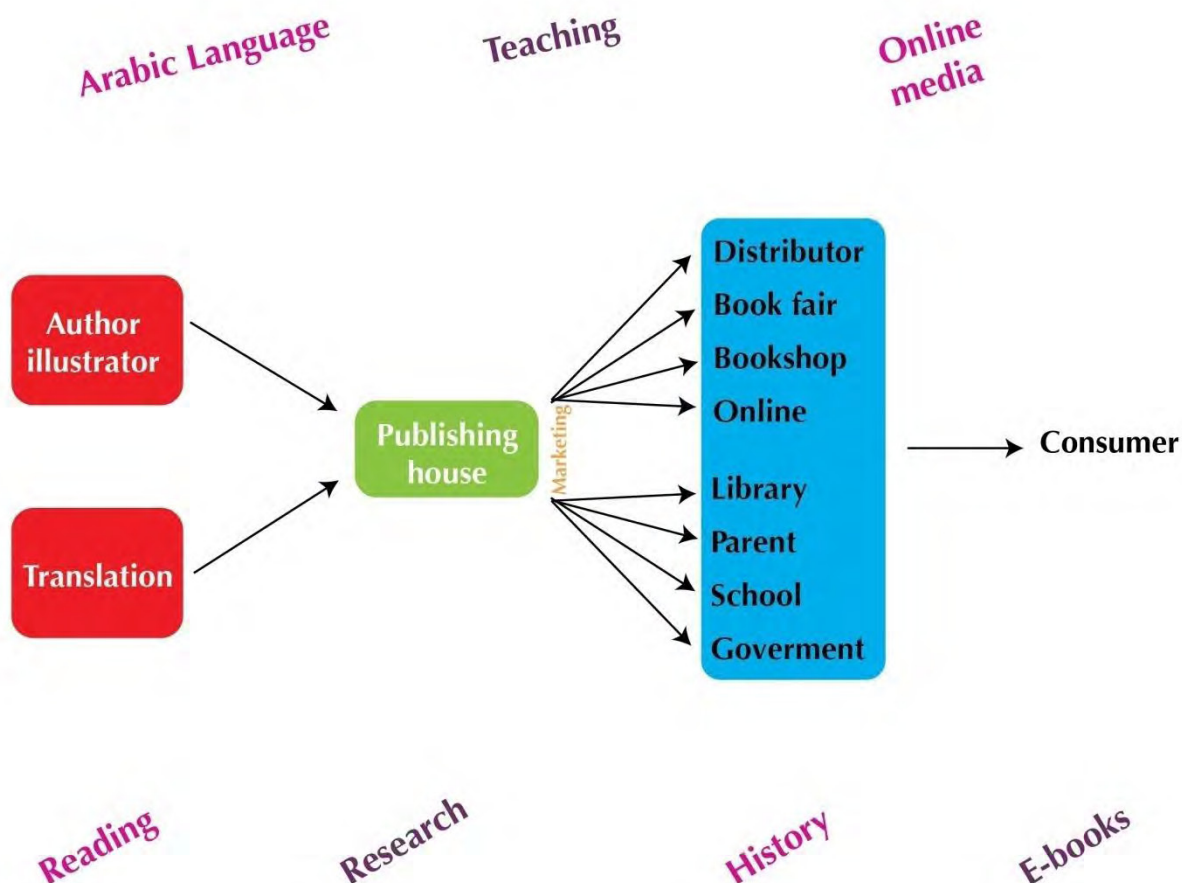


Figure 1 - The figure is a visual depiction of the chapter structure. It demonstrates how the chapter will take shape. The figure displays the three phases it takes for books to travel between publisher and child [consumer], as well as the outside factors that affect publishing. Is it worth noting that there are some other different ways that the books reach the consumer from the publishing houses where for example sometimes schools buy from distributors, parents and schools buy from bookshops, governments distributing books to schools and libraries, and schools and bookshops buy from distributors.

Introduction

The Arab World is made up of twenty-two states spread across two continents, from Morocco in the West to Oman in the East. The living environment, geography, stability, and political systems in each of these states differ; for instance, the Gulf States are wealthy, oil-rich rentier states, while the Maghreb states have oil and natural resources that take greater harnessing. The Levant states (from Lebanon through to Jordan) are politically unstable as a result of legacies of war, occupation and border disputes. What unites these states is the Arabic language and traditions relating to Islam and culture. The books published in Arabic by Lebanese publishers are primarily sold in most of the Arab countries. As a result, this study of the book market and the publishing picture it frames covers the Arab world as a whole and not only one Arab state. This chapter is a review of literature on publishing in the Arab World.

A limited body of literature regarding Arab publishing exists, but there is a scarcity of comprehensive research discussing in detail the publishing environment in the Arab World. This chapter addresses a few exceptions and comparatively assesses the data and research findings from institutions and organizations, and authors including the Arab Thought Foundation (ATF), Najla Bashour, Wischenbart and Jarrous, and Eschweiler and Goehler. Studies by Maud Stephan Hashem, the Consultation and Research Institute (CRI), and the Book and Reading Committee (BRC) in the Ministry of Culture in Lebanon focus primarily on Lebanese publishing, and these studies will be considered in greater detail in the coming chapters and particularly in Chapter One. The cited works in publishing combine to provide a richer and more comprehensive insight into the world of Arab book publishing.

This chapter examines the existing research on Arabic-language books, and considers how and why Arab publishing differs from other regional publishing markets. A limited number of specialist researchers have studied a series of themes, not least reading and distribution that make the publishing industry in Arab World unique. As a result, the following chapter is divided according to the publishing process and associated phases in order to include, compare, and analyse the scholarly debate and better identify the gaps in Arab book publishing. The following chapter is divided into five distinct parts: an overview of the main studies on Arab publishing, a review of the literature on external factors affecting Arabic book publishing, and the literature on each of the three phases of pre-publishing (phase one: author, illustrator, and/or translator), publishing, and sales. First, a summary of the research was necessary to understand the researchers' objectives and their subsequent findings.

Research Overview

The existing literature on publishing is shaped by the interests and perspectives of the researchers, and by research scope and hypotheses. When resources were found in Arabic, I translated them into English, to be referenced in my thesis. Combined, these sources are used throughout the chapter to demonstrate what happens once a book is published and reveals the various distribution problems and the impact on publishers and consumers in the Arab market.

Arab Thought Foundation

In 2010, the Arab Thought Foundation (ATF) published its fourth report on cultural development in the Arab World. According to the organization's general secretary Sulaiman Abd Almunem, the 700-page report aims to observe the cultural situation in the Arab World, while investigating several main components: education, scientific research, informatics, writing and the publishing industry, and creativity in literature (ATF, 2010, p. 9). Abd Almunem emphasizes the uniqueness of an investigation that relies on numbers, information, statistics, and documentation (2010, p. 9). He adds that it is difficult to provide solutions to a situation if it is not presented properly with adequate information, and as a result this report offered a new perspective on the Arab publishing market (ATF, 2010, p. 9).

Abd Almunem observes that working on the report was not always easy, since looking for figures in the Arab World is a "difficult task" due to the lack of an institutional infrastructure providing access to relevant information. In the Arabic-speaking region greater provision is made for the protection rather than the dissemination of data, and information is withheld on the basis of national security in order to secure bureaucratic or government advantage (ATF, 2010, p. 9). As a result, statistics are difficult to source and verify. Similarly, public access to information is far more difficult to achieve than is the case in Europe or the United States for example.

The ATF report aims to provide a wide reliable data base but Abd Almunem points out that the hundreds of figures and statistics in the report are mostly from foreign sources like the World Bank and UNESCO (2010, p. 10) highlighting the small body of research available in the Arab World. Although the ATF study produced important new research findings, many of the areas covered are examined by the CRI, albeit with a more local concentration on Lebanese publishing and reading.

In their study, *Book Production in Lebanon: A Study Done on the Occasion of 'Beirut: World Book Capital'*, CRI (2010) studied the book industry, publishers, reading, and the purchase of books in Lebanon. The CRI began the report by stressing the high quality of publishing and production in Lebanon, which made the country a leader in Arabic Book publishing (2010, p. 1). The CRI report is especially important since it investigated 177 active publishers via different resources: the Lebanese Publishers' Union, book fair records, and the Ministry of Information. The data were searched to identify which publishers were active and which were owned by the same publishing company. The reading report covered 1,000 readers ages fifteen and up, from all parts of Lebanon, providing a good sample size that covered respondents who were not included in the ATF report.

The ATF and CRI reports produced a large amount of data and figures on reading, publishing and the cultural fields in the Arab World with less emphasis on analysis. Compared with Maud Stephan Hashem's detailed book, the CRI book provides assessment of publishing in the Arab World and Lebanon in general, discussing the different factors relating to publishing.

Maud Stephan Hashem

Hashem is a researcher in the field of book publishing. Her *Book Publishing and Distribution* (2010) originated from her experience teaching information and library science at the Lebanese University where students were often unaware of the book chain and its importance (2010, p. 8). In the preface, Hashem stresses the importance of paper books in Arab publishing, remarking that unlike elsewhere, production has not been affected by the internet (2010, p. 7). Her chapters include an examination of the book as part of the cultural industry, the author, copyright, creativity, non-specialties in publishing, booksellers, and the spread of books. She also gives a general view of publishing in Lebanon, and a comparative assessment with some parts of the world. While statistical analysis is absent, it is nonetheless a study with partial analysis. Hashem writes from a researcher's point of view, making the findings more abstract than applicable to everyday publishing concerns, while Bashour analyses the publishing environment from an educator's perspective, concentrating on historical development and influences.

Najla Bashour, an academic and a children's book publisher at Tala Establishment, published three small books: *Children's Books in the Arab World* (2012), *The Mother Language from an Educational Perspective* (2013), and *How to Develop Children's Minds* (2014). Bashour approaches her subject as both a Lebanese publisher and a researcher. Bashour's publishing house is a small one, and is perceived as a cultural institution as much as a business. As such, Tala's tentative involvement in aspects of the publishing business taking part in Arab book fairs is as much cultural as commercial. According to Bashour (2012, p. 30), the main problems facing children's publishing in the Arab World include:

- High poverty levels, which limit families' ability to afford books
- The lack of widespread public libraries available to children
- Too few school libraries
- Old-fashioned language and literacy teaching methods
- Presenting the Arabic language traditionally in schools compared to the teaching of other languages, which attracts children more to Western books
- Emerging e-books presents a challenge to children's book publishing in the Arab World

Bashour states these problems in her research without going into great detail, and the issues she discusses are covered in more depth by others. Bashour's three books are small, and favour an academic view of the publishing situation over statistical analysis. While useful for a general overview, far greater scrutiny is necessary. A comprehensive analysis of states' domestic markets, as well as their regional influence, is necessary to fully appreciate the issues of children's book publishing in the region.

Bashour worked closely with members of the Ministry of Culture consultancy team (Book and Reading Committee) to produce a book that examined the patterns and processes of book acquisition and reading in Lebanon.

Book and Reading Committee

The BRC in the Lebanese Ministry of Culture published a fifty-five page report in 2010, *A Document in Order to Promote Books and the Culture of Reading*, studying the book industry and reading in Lebanon. The committee was composed of fourteen specialists,

including experts on publishing, research, libraries, bookshops, and NGOs. The document covered the following sections: authors, publishing, marketing, bookshops, public libraries, and reading. Both Hashem and Bashour were part of the committee and many of the report's ideas echo their particular perspectives. Each four-page section is presented in terms of objectives, information available, problems, and suggested solutions. While short on statistics, the BRC report includes the views of specialists from different parts of the book chain. In contrast, the UAE's Publishers Union's research has focused on precise studies in the publishing market, with the help of an array of international specialists.

Wischenbart and Jarrous

Both Rüdiger Wischenbart, a publishing and international book consultant and founder of Content and Consulting, and Nasser Jarrous, a Lebanese publisher and a consultant specializing on the Arab book industry (Jarrous for Fairs & Events), worked on the report *Book Publishing in the UAE: A Survey and Analysis* (2012). The report introduces the current overall Arab publishing market before moving into more detail on the UAE situation. A publisher himself, Jarrous gave the survey an inside perspective on the regional publishing business. Despite the limited number of overall statistics about publishing in the Arab World included in the report, the authors did provide some reliable data on imports, exports, and distribution in the rapidly-changing UAE market. Wischenbart and Jarrous's conclusion that distribution faces many challenges in the Arab World benefits from the deeper analysis of the publishing market completed by Eschenweiler and Goehler.

Eschweiler and Goehler

To better map the issues of distribution, Eschweiler and Goehler conducted a systematic study of book distribution across the Arab market. The study published by Springer, a German publisher, in the September 2010 *Publishing Research Quarterly*, sets out the key issues detrimental to distribution for Arab publishers. Kulesz observes that "[i]n a survey sent to 600 Arab publishers, Goehler discovered that only 2% of the interviewees were satisfied with their distribution" (Kulesz, 2010). Distribution difficulties feature in all the existing analyses. Eschweiler and Goehler argue that the main hurdles affecting the book market in the Arab World are censorship, money collection problems, differing

regulations, no broad database of the books published, and most importantly the “lack of uniform book distribution system” (2010, p. 1). The authors’ analysis was systematic and logical, originating from a non-Arab observer’s perspective.

The sourcing of data, statistics and information regarding the Arab publishing industry book is hampered by the lack of primary open source and even commercial material and publications on the topic. In addition, many of the existing studies are not updated, and are rarely systematic. Existing data tends to provide a snapshot of current trends, with little systematic analysis over time. Research is often constrained and dependent on funding circumstances. For instance, UNESCO’s 2010 *Beirut: World Book Capital* was a catalyst for producing funded research on publishing, especially in Lebanon. As a result, the need for investigating other resources was critical, and led this study towards researching and referencing journals.

Periodicals

Periodicals, including trade magazines and online resources, are increasingly important information dissemination mechanisms for the book publishing and marketing industries. As a result, research methods in publishing need to be adaptable to change in tandem with an ever faster-moving industry. Publishing conventions and ideas about marketing can be challenged and questioned with the release of a new bestseller or the trial of a new marketing technique. Periodicals about publishing and the book industry are vital to this research since they identify, monitor and evaluate changes in the market. *The Bookseller* trade periodical is important for identifying ideas and changes. According to their website, *The Bookseller* has been one of the leading business magazines for the book industry since 1,858 reaching over 150,000 users each month. *The Bookseller* is a source of objective industry news and analysis, covering all major publishers and bookshops in the UK and up to 100 other countries in the world, and providing coverage of books, marketing, and reviews up to three months prior to their publication. The quality of a *Bookseller* review is used as the reference in the industry and is taken into account by the national press and at literary festivals throughout the UK. *Publishing Perspectives*, is an online trade journal of international publishing, is also important in the study. *Publishing Perspectives* has a daily electronic edition, in addition to a children’s edition. On its website, *Publishing Perspective* claims to be “the BBC of the book world”. The journal covers the UK and the Arab World, including book fairs and markets. Both *The Bookseller* and *Publishing*

Perspectives are reliable sources due to the quality of their written work and their reputation in the publishing industry. Changing trends in publishing discussed mainly in the UK marketing chapter were first noted in these online journals. The UAE book fairs and market have been discussed several times in both *Publishing Perspective* and *The Bookseller*, due in no small part to the efforts by the Sharjah Book Fair and Abu Dhabi Book Fair management to invite international publishers and journalists for better exposure.

In the constant search for information about the Arab publishing industry, *Arabic Literature*, an English language online resource of current Arabic literature issues, is referenced in Chapter Three and Chapter Four specifically, since the magazine gives critical new perspectives that differ from the focus of the book fair management agenda. This magazine is “devoted to the exploration of Arab and Arabic literatures, the art of translation, [and] the difficulties of publication” (*Arabic Literature*, 2014). *Arabic Literature* publishes commentary on recent issues of publishing, writing, and the changes in the market, and includes information about the all-important Arab book fairs. The magazine sometimes carries short interviews with visitors and officials at book fairs in order to discuss the fairs’ main activities, weaknesses, and highlights. New governmental policies and activities in the Arab World related to books and reading are discussed and noted in their articles. When I interviewed Marcia Lynx Quarley (2014), the editor, she stated that “the website reaches a broad audience of 60,000 views per month by translators, authors, publishers and general readers.” She added that the website “is a group effort by Arab and Arab-specialists, authors, scholars, journalists, and translators”, where contributors share information and comments. Having different specialists writing in *Arabic Literature* makes the resource richer seeing the situation from different and wider perspectives.

Online journals are important in this project because they are constantly updated. The approach and style in which articles are written provide a new perspective on publishing with a heretofore-absent critical analysis. For instance, reliance on book fair websites can only present the image that the management wants to give the public, and a more critical opinion is needed to get a clear idea of the environment.

The research has also taken into consideration books written on publishing and marketing in the UK. *How to Market Books* by Baverstock (2015) is referred to especially in Chapter Six.

The information gathered from the reports and journals are now organized into publishing iterations or phases which will be discussed in the next section.

Factors Affecting Publishing in the Arab World

“The primary definition of ‘to publish’ given in the *Oxford English Dictionary* is ‘to make public’ ... Professional publishers go much further and undertake a range of activities” (Clark and Phillips, 2014, p. 1). Publishing is a process with many elements. It usually starts with material (from authors, illustrators, and/or translators), moving into the publishing house itself (editing, design, production, marketing, and sales), and then onto markets (through distributors, schools, book fairs, bookshops, direct sales, and online).

A series of variables or factors shape the book publishing process in the region, including

- 1- the use and role of the Arabic language
- 2- the legacy of external powers of education and teaching practices
- 3- the freedom of the press and the liberal or conservative perspective of the media
- 4- the pattern of national or regional reading practices
- 5- the rigour of research
- 6- the role of domestic and regional history
- 7- the impact e-books have had on domestic and regional markets

Bashour (2012), in keeping with existing research findings, stresses the role of Lebanon as a publishing capital in the Arab World. Her work highlights the fact that the current era of children’s books in the Arab World is one of development, where more children’s book titles are being published that consider international development and Arab specificities. Bashour was one of the few people to discuss the development of children’s books in Lebanon and the Arab World. Numerous studies and journal articles have lamented the lack of statistics available and attempted to address the slow development of marketing in the Arab publishing industry and the lack of reliable data available (for example ATF, 2010; Wischenbart and Jarrous, 2012; Idriss, 2013; Abu Dhabi Book Fair, 2014; Eschweiler and Goehler, 2010). In addition, ATF discussed the nature of online research and the effects on publishing in the Arab World (2010, pp. 184 - 300). Both CRI (2010) and ATF (2010) researched reading in the Arab World: mainly the what, where, and the frequency of reading. The Arabic language itself and the way it is taught has a significant influence on reading discussed by ATF, CRI, Humaidan, and Bashour. Books used in

pirated seriously affecting the publishers' income. A comprehensive analysis of the variables that influence publishing will be discussed in Chapter One.

The following section will discuss the resources available on three phases of publishing.

Phase One of Publishing: Authors, Illustrators, and Translators

Phase one reflects the stage that precedes publishing, which has the main elements of creating the information needed for publication. The content published in books, originates most of the time with authors, illustrators, and/or translations, and has been discussed by CRI, ATF, and BRC.

Authors and Illustrators

Authors and illustrators are the main source of content in most children's books. Although none of the researchers discussed above discuss illustrators, illustrators play a major role as a content providers in children's books. The ATF report discusses authors in both the reading and the publishing studies sections. From the publisher's point of view, the survey shows that 61.8% of people buy books in their own specialty-field, 21.1% view price as a reason for purchasing books, 15.1% buy newly published books in the study or specialization domain, while only 2% of readers buy books because of well-known authors (ATF, 2010, pp. 324-325). The ATF also found that 79.7% of publishers publish books for first-time authors (2020, p. 327). The results are important because they highlight the author's weak marketing/publicity role in the Arab World. According to publishers, the relationship with authors is seamless; 95.8% make sure to forge a deal and then sign contracts with authors, and 83.9% have a system of payment (ATF, 2010, p. 328). The most common way to pay authors is a onetime payment for the selling of rights (68.2%) (ATF, 2010, p. 328). When respondent publishers were asked about the problems they have with authors, they mentioned financial losses, failed commitments from authors in the contract, or authors trying to deal with more than one publisher (ATF, 2010, p. 328). Growing up in a publishing family, one of the main business ethics we are raised on is respecting the other publishers' specializations by not dealing with the same author. With an influx of new publishers in the market, the practice of authors dealing with several publishers is becoming more common, but many second generation or third generation publishers think of it as a problem. The ATF results are based on the publishers'

perspective, in which the publishers try to portray a good image about their relationship with the authors. Therefore, further research about authors is needed from the authors' point of view. CRI (2010, p. 40) and Hashem (2010, p. 55) stress that the relationship between publishers and authors is characterized by mistrust.

The BRC confirms that there are laws in Lebanon to protect authors, while there are laws that can have a negative effect on the authors' rights (2009, pp. 9-10). The main problem that BRC mentions is the fact that authors cannot survive from writing alone, since many guarantees and security are not provided (2009, p.10). The CRI confirms that most authors do not leave their other jobs; this occurs very rarely, with internationally famous and award-winning authors (2010, p. 35).

The British study "*What are Words Worth Now?*" observed a total of 2,454 writers where 56% were men and 44% women. The study "showed that in 2013 11.5% of professional authors, defined as those who dedicate the majority of their time to writing, earned their income solely from writing" (Shaffi, 2014). The percentage was higher in 2005, when 40% of authors lived by writing (Shaffi, 2014). These percentages and the average income for authors in the UK show that it is in a much better situation than Lebanon, but still it seems that the situation of authors is weak in both countries. There is a widely-acknowledged lack of studies and statistics in Lebanon and the Arab World about authors and writing (BRC, 2009, p. 10) and (CRI, 2010, p. 35). Historically, authors and translators have mostly been teachers, other than the few poets (CRI, 2010, p. 35). The comparative analysis provided by Shaffi on British publishing and rights suggests that Arab publishing and the authors' environment is in need of more research to be able to present specific data and analysis of the situation. However, since the Lebanese government taxes authors' royalties, it is unlikely that authors give the exact numbers, making the data far from transparent; more details about the authors' relationship with publishers will be discussed in Chapter One.

For Arab publishers new sources for publishing books are found by translating books from other languages. The section below will discuss the results on translation from the ATF research.

Translation

In the 1960 and 1970, translation from other languages (primarily French and English) appeared in Lebanon (CRI, 2010, p. 36). Translation had two main effects on publishing:

the number of authors of literary work and children's books increased due to a higher demand for translations, with a high quality of their design and text (CRI, 2010, p. 37). The ATF research discovered that more than half of publishers translate books, more than half of them do not work with professional translators, and the majority of the publishers asserted that they do not face problems in publishing translated books (ATF, 2010, pp. 326-327). From the results above, it is clear that translation is one of the mechanisms publishers can easily employ to produce more varied books, but if we look at the houses' specializations, many are known for religious Islamic books (which are hardly ever translated), literary books (including fiction and poetry), and textbooks books. These genres are the least likely to face problems, unlike political or historical books, for instance.

Authors, illustrators, and translators need a publishing house to publish and distribute their work. Lately, children's authors have begun opening their own publishing houses in Lebanon (discussed in Chapter One). The situation of publishing houses affects the relationships of authors, illustrators, and translators with the publishing house itself. The following section will discuss publishing in the Arab World from the researchers' point of view.

Phase Two of Publishing: The Publishing Environment

Phase two is related to the publishing environment, itself, mainly relating to what happens with publishers in their own companies. Few studies have discussed the publishing business while CRI and ATF went into details based on surveys carried out with publishers in the Arab World.

The Abu Dhabi Book Fair data identifies the importance of Egypt and Lebanon as the main book producers in the Arab World; Lebanon produced 3,121, 4,165, and 3,330 books in 2006, 2007, and 2008, and Egypt produced 3,016, 2,960, and 2,310 in the same years, suggesting that while the quantity of books published is vital, other variables are perceived to be equally important. According to Bashar Chebaro (a well-established Lebanese publisher), the influence of Egyptian and Lebanese publishers can be attributed to the more advanced distribution systems in both countries (*The Arab Book Market Facts and Figures*, 2014).

According to the ATF report, 27,800 books were published in 2007 in the Arab World, the majority of which were literary and religious (13,411 books); religious books appear to be the larger number, and usually sell the best in book fairs and bookshops (ATF, 2010, p. 389).

The ATF report stresses that publishing in the Arab World is not in a better situation than reading, since the supply and demand process is weak due to the small number of readers (2010, p. 323). The director of the Cairo Book Fair concluded that publishing in the Arab World is 'not good' since the biggest publisher would not 'dare' to print more than 3000 copies of a title (some print only 500 copies) (ATF, 2010, p. 323). The ATF's research on publishing covered 154 publishers from Egypt (39.3%), Syria (15%), the Kingdom of Saudi Arabia (12.1%), and Jordan (8.6%), with 85% of the respondents belonging to the Arab Publishers' Union. 66% of the publishers were specialized publishers: Islamic publishers (19.2%), literary publishers (13.7%), scientific (2.7%), technology (1.4%) (ATF, 2010, p. 323). The responding publishers published 2,683 books in 2009, around 46% reprints and 35% of the books published were religious books (ATF, 2010, p. 326).

There are many obstacles that publishers face, mainly increasing printing costs (27.5%), censorship and controls on books (23.3%), difficulties in shipment and transport (8.7%), and price (1.4%) (ATF, 2010, p. 329).

Price: The ATF noted that there is a conflict in the way that publishers do business, since although the responding publishers stressed the importance of price to customers, when publishers were asked about their concerns in publishing over 80% identified book design while only 19.9% named book costs and prices among their concerns (2010, p. 326). However, since the report concentrated on Egyptian and Syrian publishing houses, both known for the lowest-priced books in the Arab market, the data might not be completely representative.

Distribution: Publishers added that 33.9% face some distribution problem, while 29% mentioned that they only sometimes do (ATF, 2010, p. 329). The results are similar to existing research that highlights the distribution problems in the Arab World.

ISBN: 91.8% of publishers are keen on obtaining ISBN numbers (ATF, 2010, p. 331). None of the studies, including the ATF report mention the number of publishers using ISBNs in the Arab World. This omission demonstrates the lack of data and the lack of rigour in the quantitative analysis of Arab publishing.

Support: 82.5% of publishers did not receive any support from local cultural institutions, 85.1% received none from cultural institutions in other Arab countries, while 89% did not get support from any (non-Arab) foreign cultural institutions to publish specific books (ATF, 2010, p. 331). Similar to the researchers' predicament in sourcing data, very little support is given to publishers in the Arab World due to policies and priorities. Many British and European publishers work with little support, though the presence of readers, and public libraries and schools with purchasing budgets makes the market large enough for publishers to grow and develop the industry further.

The ATF (2010, p. 331) concluded:

- few scientific books are published in the Arab World
- few books are published in general in the Arab World
- publishers are profit-maximizing businesses aiming to sell many copies following the customers' needs
- a majority of publishers focus on religious books
- many publishing houses do not deal with professional translators or contain specific translation departments
- publishers face many problems in book fairs
- and publishers are not pessimistic that ISBN numbers will affect future studies [which means that more publishers might be using ISBN numbers in the future]

The results of the ATF publishers' study are highly slanted by the fact that most of the respondents are Egyptian, while Lebanese publishers were not included in the research. Lebanon is one of the major publishing countries in the region, and taking it out of the research limits its scope and relevance. The research did not mention any children's publishers, or whether publishers include children's books in their lists. The general problems that most Arab researchers mention are also confirmed by the ATF research respondents, and are mainly distribution, piracy, ISBN, censorship, and book fairs.

The ATF (2010, p. 646) summarized the findings from two January 2009 conferences held on *Problems of Book and Reading* by the Higher Cultural Council in Egypt.

- The book industry has "inherited the diseases of the first publishers" in the Arab World, who operated on the assumption that most people are illiterate or culturally illiterate and no longer buy books once they leave school
- When Arab publishing is compared to that in other countries, where publishing was similarly introduced at a later stage (such Malaysia, Singapore, or Korea), we find

that these countries are in a much better position than the Arab World in terms of production, distribution, and innovative ways of reaching readers

- The problem in book production in the Arab region is the fact that publishing started as an individual business and it was inherited across more than two generations. The first generation was those who loved books or authors who could afford to start their own publishing houses. The first generation of publishers used to work with authors and suggest titles and topics, read the manuscripts, might review proofs, and follow up on distribution. The problem is that except in a few cases, the publishing industry did not shift towards professionally-run businesses, and firms remained small and personality-focused, in contrast to their peers in the USA, France, UK, Germany, and Japan. Some people entered the industry despite a lack of expertise, leading to critical mistakes like taking manuscripts from authors and sending them directly to printers without a glance

The results of the conference suggest that publishing as a family business has affected the development of the industry, since second-and-third generation owners often do not have the same qualifications as their predecessors. Overall, family businesses (discussed in Chapter One) have both positive and negative effects on the industry. In some cases, hereditary management kept the business small and limited, while in others, family business enabled firms to survive in uncertain environments, given the importance of family name in the Arab society. The literature highlights both the many problems facing publishers in the Arab World, as well as the gaps in research. This is especially true of Lebanese children's publishing, where neither the process of publishing itself nor the market has been studied in detail. Greater scholarly attention towards these areas could lead to experimenting with new ways of marketing and promoting children's books. Publishing in the Arab region faces many problems, some of which continue to the stages after publication.

Phase Three: The Book Supply Chain

Phase three is linked to what happens to the book after publication, how it is delivered to readers, where it is delivered, and who these book customers are. The children's book market is a distinct one, because in most cases the customer and the consumer are *not* the same person. Most children's books are purchased by adults such as parents, teachers, or librarians, while most are read by children. Many researchers have discussed the Arab

market and it has been looked at from different perspectives such as those of researchers, publishers, and experts.

The Arab Market

Wischenbart and Jarrous conducted research for the Emirati Publishers Association that examined *Book Publishing in the UAE*. The report also addressed the broader Arab book industry, discussing the issues of literacy, piracy, ISBNs, and distribution, while relying on generalized data. The report is intended to provide information about the UAE book industry, while documenting the developments in UAE publishing tailored to attract foreign publishers and open the domestic and regional publishing market.

Wischenbart and Jarrous portray the book industry in most of the Arab World as best “characterized by complexities and challenges” (2012, p. 8). Wischenbart and Jarrous maintain that Arab book markets are “fragmented,” where information about new titles and distribution “remain the biggest challenge for the industry” (2012, p. 9).

In its reading study, the ATF found that 47% of respondents prefer to buy books from book fairs, 35% directly from publishers’ selling outlets (mainly bookshops), while only 4.5% prefer to buy books online (ATF, 2010, p. 319). The ATF results highlight the differences between Arab and international markets, including primary sales role of book fairs, and the weakness of the bookshops and online retail.

Rana Idriss, a long-established Lebanese publisher and manager of Dar Al-Adab (one of the main Lebanese general interest publishers including adult fiction and children’s books in the Arab World) who took part in our publishers’ survey, spoke to Asharq Al-Awsat newspapers about the regional publishing environment, stating “the Arab publishing world is facing a crisis” (Idriss, 2013). Again, Idriss presents a point of view of a single publisher attempting to map the book market in the Arab World. Moreover, Idriss draws our attention to the realities of the transition and instability shaped by the Arab Spring, resulting in many existing markets closed to seasoned regional publishers. Idriss observes that Libya, Sudan and Iraq are cut off from the Arab publishing industry as a consequence of political turmoil and associated market instability. Idriss believes the Egyptian market to be weak because of the very low purchasing power of its citizens. The Lebanese market is very small, while the Gulf market as “the most important of all markets” is nonetheless a fledgling market despite growth (Idriss, 2013). The findings of this research tend to align

with Idriss' portrayal of the market as constantly changing. Both sources, Idriss and Wischenbart and Jarrous, highlight the fact that the Arab market faces many problems, chief among them the many distribution issues.

Distribution

The main distribution problem in the Arab World is due to the fact that publishers must sell their books directly to the customers themselves. Unlike other regional markets, publishers alone are responsible in most of the times for the distribution and shipping of their stock of books.

Chebaro identifies distribution as a major problem, and notes “that copyright infringement is another pressing problem (and is related to the aforementioned distribution difficulties)” (*The Arab Book Market Facts and Figures*, 2014).

The Abu Dhabi Book Fair points out that there is no co-ordination or “mega-distribution” in the Arab World that traverses borders and states, making it difficult for publishers to navigate even at the best of times (*The Arab Book Market Facts and Figures*, 2014). These findings on the distribution crisis are endorsed by Owen, who describes the region as a “fragmented market” that affects distribution in the Arab World (2013, p. 30).

Based on a study done by Newmex, an international business consulting firm, Eschweiler and Goehler identified six facts about book distribution in the Arab World:

- 1- the “selling book fairs”
- 2- “today’s distribution structures reflect the commodity type character of the Arabic books”
- 3- the poor usage of ISBNs
- 4- the “poor quality of Arabic book retailing”
- 5- piracy or copyright violation
- 6- and limited internet literacy in book sales and e-payments

What sets this study apart is the way that the authors analyse the results in tandem with other factors. Of these factors, book fairs are identified as the core vehicle for book sales.

Eschweiler and Goehler portray Arab book fairs as “crowded book bazaars rather than executive meeting points,” with the exception of Abu Dhabi Book Fair (2010, p. 1).

The book bazaar observation is often well-deserved. Publishers in the Arab World ship large quantities of books to book fairs and sell them to the public with some physical cash transactions with distributors and end customers.

According to Eschweiler and Goehler, the focus and onus on book fairs, with high costs and inefficient distribution, means that books become “low interest items” and are delivered in “poor conduct conditions” (p. 4). Books in the Arab World are sold at low prices and at large discounts that affect the incomes of authors and publishers. It is not only the purchasing power of Arab buyers that impact book purchases, but also the willingness of customers who would rather spend money on luxury experiences such as restaurants or mobile communication rather than on a book. As a result, publishing industry participants attempt to save costs where they can, meaning that many publishers become distributors themselves, selling books directly to individual customers and organizations. Saving on costs also impacts marketing and advertising and so budgets, where available, are kept to a minimum (2010, p. 5). It is debatable as to whether book fairs mainly exist because of distribution problems and cost savings, or if the need for publishers to get closer to customers and end users carries more weight. There is a need for greater study of Arab characteristics and book purchasing habits. This issue will be covered further later in Chapter Two and Chapter Six.

Eschweiler and Goehler argue that technology and regulation influence book publishing and sales. The use of ISBN codes for books varies from one country to another. In many countries, publishers see the usage of ISBNs as prohibiting cross-border distribution and creating more regulatory problems than they attempt to solve. For some Arab publishers, the transparency created by ISBN codes benefits regulators and facilitates control of official entities over the books, with no benefit for the publisher. The Arab publishing world suffers from the same black market problems as other producers. Piracy or copyright violations are linked to poor distribution and poor book exports. Greater use of ISBN codes or regulation may well improve the issue of copyright violation and piracy. Though this argument counters the earlier view of ISBN numbers as threatening cross border sales, a more centralized distribution network would mitigate the risks of book publishers tasked to publish and distribute (2010, p. 5). Publishers often don’t see the need to use ISBN, and can get away with avoiding them due to weak regulations. In Lebanon, the process to

receive ISBN numbers is very complicated and requires many documents. There are many reasons for the ISBN problems, and a more detailed study is needed.

Quality follows as an important factor for publishers. According to Eschweiler and Goehler, the “poor quality of Arabic book retailing” is critical in the Arab World where books are primarily sold in urban areas. This is due to the fact that there are very few bookshops found in the countryside. “All in all, bookstores neither exist in sufficient numbers nor are they evenly distributed” (2010, p. 6). For instance, Newmex located 100 bookstores in Egypt (one of the largest Arab markets), in comparison to 5000 bookstores in Germany.

Hashem, the CRI, and the ATF share the same ideas about the location and problems of bookshops in the Arab World (discussed in detail in Chapter One). If we look at publishing as a supply and demand process, a higher demand for books would lead to more bookshops opening. The goal is to increase book demand by creating more enthusiastic readers.

One of the key problems in the Arab World that Eschweiler and Goehler discuss is payment, where many distributors retain the book revenue for extended periods of time, reducing commercial attractiveness. As a result, many publishers prefer to sell the books themselves, or indeed is going out of business (2010, p. 6). Payment is a serious problem in the Arab World, where customer promises to pay are often not quickly followed up. This can lead to heavy losses, company closures, and expensive legal cases.

Finally, Eschweiler and Goehler consider limited marketing diversity and the failure to include internet options in book sales and e-payments as problems that negatively impact distribution in the Arab World. According to their research, powerful online ordering systems do not exist in the Arab World, where payments by credit cards are most common. “Furthermore, due to small margins players must keep their expenditure on promotions, marketing, and advertising to a minimum. As a result readers are left unaware of the new titles” (Eschweiler and Goehler, 2010, p. 5). The ATF (2010, pp. 186 and 204) and CRI (2010, p. 119) results on internet use in the Arab World highlight the problems of trust that Arab users have with buying online. It is worth noting that online marketing and e-payments, which Eschweiler and Goehler suggest are necessary to develop distribution, might not work at all. This is due to the characteristics of the Arab online internet user who is not precise in his/her search, uses the internet to read emails, and does not trust the online media enough to move from browsing to purchasing.

Eschweiler and Goehler present analyses of the problem from a “Western” perspective, where they rely on the development happening in the “West” and try to compare the Arab market to the developed markets. They have presented a structured analysis that seeks to bridge the data deficit. Nonetheless, a greater analysis is needed to take a closer look at the traditions of sales and the impact of Arab culture on Arab book publishing.

As a publisher and a researcher engaged in studying the Arab World workings of publishing, I hope that this study will benefit from a dual perspective that provides a multi-dimensional analysis of the Arab publishing environment. Book fairs provide a critical mechanism for connecting with buyers and exchanging ideas about market needs, and are thus not just a selling outlet for publishers. A characteristic of Arab business life is the onus placed on trust, honour, and communication in doing business (Kharkhar and Rammal, 2013, p. 3). Book fairs are an ideal way to communicate with buyers, network with other publishers, and connect with the broader regional market. It is worth mentioning that many publishers do not take advantage of this opportunity and just sell without properly communicating with the customers through offering explanations about the books and responding to the customers’ questions. In addition, buying books online is limited, since the experience of buying and creating long-term custom in the Arab World relies heavily on communication. The reliance on book fairs can be also due to the fact that book fairs are a plain old transaction for selling books that publishers and customers are used to.

Speed is another dimension that Eschweiler and Goehler argue is necessary. In their analysis, the time needed for books to reach the end user is critical to sales. Eschweiler and Goehler did not take into consideration that in Lebanon for instance warehouses are usually owned by Lebanese publishers. Family businesses are often long-established and allow for a different pace and less urgency for a fast sale. As a result, the capacity to stagger sales and curb the urgency to sell books in haste benefits established publishers, since book buyers such as school teachers, ministry officials, and book sellers usually spend a considerable time reading new titles and selecting books, making the whole circle of distribution protracted. With the political instabilities in many Arab states, ISBNs become less of a priority for governments to regulate and enforce. The economic situation in a particular Arab book-buying country is often (though not always) that of a fledgling economy, where people rely on agriculture, giving the buyers less purchasing power and reducing demand for books. The Gulf States are the exception to this, as rentier states with large sovereign wealth reserves; their populations tend to have greater disposable incomes. Book sales tend to be higher in the Gulf States than some of the other states in the region.

Similarly, education plays a critical role, since literacy is often not as widespread in rural areas.

Piracy notwithstanding, publishers have been known to pirate and plagiarise books themselves, this cuts into fellow publishers' profits, and hinders trust relationships in an environment when trust is especially valued because laws are not as well regulated in areas where the governments are preoccupied with other political problems (piracy will be discussed in more detail in Chapter One).

Late payments are usually taken as an opportunity by other publishers to seize the opportunity to work with a certain "fashionable" distributor, and with no clear agreement between publishers on refusing to deal with certain distributors. As a book publisher for example, if I want to buy rights from a UK publisher for the first time I need to send references to them from other UK publishers.

Distribution plays a main role in spreading books to reach the public. The ATF report agreed with the problems presented in previous studies, adding new dimensions to the problems affecting the spread of books.

Dissemination of Reading Culture

In their conference, *Writing and Publishing in the Arab World*, the Arab Thought Foundation (ATF, 2010, pp. 642-644) summarized earlier papers and findings, mainly mentioning some problems that stand in the way of spreading of books, the diminishing number of readers, and pushing the Arab World into a problematic situation in education and culture:

- The lack of novels and long stories for the Arab child, where the dominance of re-written or translated religious, and folk tales lead to a weak children's book "library"
- the preference for religious books, horoscopes, fun and comic books, translated novels;
- the lack of plans to promote reading at home, school, and university
- and the obstacles stopping books from reaching readers due to censorship, "suffocating" freedom of expression, and economic barriers that affect money transfers between countries

The ATF results draw a complicated picture of the book and publishing environment in the Arab World, where many factors play a role in the spread of books. Since distribution is weak in the region, most publishers rely on book fairs to sell books and enter new markets.

Book Fairs

According to ATF, 93.3% of respondent publishers are keen to take part in book fairs. This is mainly due to several reasons: good management, meeting publishers from other countries, increasing sales, and connecting with readers (ATF, 2010, p. 328). What is interesting in the publishers' answers is that some publishers aim to connect with individual readers and not business customers, highlighting the role of personal networks and relationships in business in the Arab World and the role of book fairs as sales points to the public directly, avoiding the middle man. Publishers mentioned that there are some problems with book fairs in the Arab countries: the conflict of dates where more than one book fair can take place at the same time (27.2%), low level of services and management (19.8%), and high costs (14.8%) (ATF, 2010, p. 328). The issues that the surveyed publishers mentioned are common to publishers in the Arab World, stressing the importance of book fairs to sell books and highlighting the need of publishers to be present in most of the book fairs even though their dates overlap.

The respondent publishers chose the Cairo International Book Fair as the most important fair to take part in (63.6%), followed by the Riyadh Book Fair (12.1%), then Sharjah (5%) (ATF 2010, pp. 328-329). Although the Cairo Book Fair is one of the biggest in the Arab World, purchases in the book fair are often limited to cheaper books since the majority of Egyptian customers have low levels of disposable income. Riyadh is one of the main book fairs that publishers seek to take part in, and they report high sales. That most of the respondents are Egyptian publishers is a major factor in choosing Cairo Book Fair as the first choice.

Fewer than half the respondents in the CRI study visit book fairs, of whom only 27% frequently or mostly buy books from book fairs. 41% view the price of the book as a main factor affecting book choice (CRI, 2010, pp. 152-153). Although compiled in different countries and on different kind of respondents (book fair visitors vs. the general public and publishers), the results from both the CRI and the ATF both reflected the importance of the book fair as a main source of buying books where many publishers sell books to their

customers and to bookshops in the book fairs. Book fairs will be discussed in more details in Chapter Three, Chapter Four, and Chapter Five.

Buying in Bookshops

Around half the respondents in the CRI research have visited bookshops in their lives, with the average visits one and a half times per month; there is a high correlation between income, education, and bookshop visits (2010, pp. 139-140). Only 21% of the bookshop visitors often buy books there; more than half of the respondents sometimes buy books; more than one-third of the respondents visit bookshops to buy a specific book; only a fifth of the respondents skim books, and 18.4% try to know what is new (p. 141). 56.5% express concern that there is no one in the bookshop to help them or advise them on books (p. 141). The results above show that there are few bookshop visitors, where skimming new books is not a habit and visits to the bookshop are often for a specific reason, customers are not offered the help they need, thus limiting the role of bookshop into introducing new titles. The bookshop in Lebanon will be studied in more details in Chapter One.

If bookshops are not available in some areas, people can buy books online. However, the situation of book purchases online in the Arab World is different from other parts of the world.

Buying books online

The weak use of the internet seriously affects the patterns of book purchase in the Arab World. In September 2010 the study *Media consumption & Habits of MENA Internet Users* results showed that

only 32% of the inhabitants of the Arab World are in the habit of buying products or services via the Web, compared with 62% in the United Kingdom. Almost half of those surveyed were from the Gulf States – with greater purchasing power –, and very few from the Maghreb (13%) or the Levant (7%), where digital consumption habits tend to be even lower. (Kulesz, 2010)

The results from the CRI (2010, p. 119) and the ATF (2010, pp. 186 and 204) display the trust issues that many Arabs have with buying online, in addition to low searching skills. Neither of the two studies shows percentages and compares them to international habits, which makes Kulesz's use of hard data especially important.

Another characteristic that distances the Arab World from the countries of the North is the unwillingness of Internet users to make online purchases, which perhaps explains why none of the virtual stores aimed at PC users from the internal market has been particularly successful. (Kulesz, 2010)

Kulesz findings support and can complete the picture that CRI and ATF drew about the use of internet in the Arab World. Online buying media is weak and there are few hopes for progress in the near future.

If people cannot afford books or want to borrow a book to read, public libraries are one of the choices that should be available to the readers.

Purchasing Power of Public Libraries

Public library purchases account for a small part of the sales of books in the Arab World. The percentages can differ between countries. Books are usually bought by governments themselves, NGOs, embassies, or the public libraries (based on funding). For instance, in Tunisia the Ministry of Culture supplies books to their public libraries, while in Lebanon different parties purchase books and supply the public libraries. In the section on public libraries, the BRC report discusses the situation in Lebanon, where many libraries have been opened with the help of the Ministry of Culture, Assabil (NGO), and international embassies reaching more than 100 in 2009 (2009, p. 26).

The BRC (2009, p. 26) discussed the main problems of public libraries:

- geographical location, since many cities and villages do not have public libraries
- publicity and promotion, where there is a lack of publicity plans
- and the human and technological capacities are limited: where often one person is in charge of the library and of promoting it, the workers are not specialized, there are non-stable work positions, and a lack of developed equipment

The ATF (2010, p. 317) and CRI (2010, pp. 152-156) reports both discussed public libraries in their reading studies, where the respondents confirmed their infrequent visits to public libraries, and the fact that books and references in public libraries are not often updated.

Conclusion

The available research on the Arab publishing and marketing industry too often focuses on several influential publishing hubs in the Arabic speaking world while overlooking other areas. Many studies covered publishing and reading habits in Lebanon, the UAE, and Egypt. Interestingly, all resources agree on the main problems facing Arab publishing, with a great need for studies and development. After repeatedly reading the references, I have noticed that most of the researchers see the problem from different perspectives, but arrive at similar conclusions.

The existing literature on Arab publishing identifies the gaps in marketing and publishing, and attempts to explain the rationale for the use of more traditional means and mechanisms. A series of variables particular to the Arab World shape the nature of publishing, marketing and distribution in the region. Almost all studies agreed on the facts that there is little research on the Arab World, that publishing and reading are in a weak position there, that education and the teaching of Arabic needs to be developed and modernized, and that books are not spreading and reaching readers. Limited regulatory mechanisms fail to implement ISBN numbers, weak distribution mechanisms hinder efficiency in sales and payment systems, and an open unregulated market compounds piracy problems. Wischenbart and Jarrous conclude that “[t]oday, when an Arab publishing sector aims at developing its professional standards, it is doing so at a complicated moment, when this traditionally conservative industry is confronting truly radical change everywhere, while keeping pace with highly diverse audiences who use published books not only to read and educate themselves and their children, but also to stimulate the whirlwinds of innovation” (2012, p. 11). The Abu Dhabi Book Fair’s website ends the section with optimistic views about the future of the Arab book market. Despite these challenges, the Abu Dhabi Book Fair asserts that “[o]verall it seems that in spite of the problems, there’s a great opportunity in the Arab World. There is a strong interest in continuing to translate more foreign works into Arabic, and there is an array of interesting books waiting for translation. As the distribution system continues to develop, the book market should continue to expand” (*The Arab Book Market Facts and Figures*, 2014). I doubt whether this is a fact or if the UAE report simply seeks to attract more foreign players into the book market and the UAE book fairs. What is missing from the existing mapping of marketing and publishing in the Arab World is a study of the children’s book publishing and an assessment of the cultural concordats or “unwritten understandings”

which shape the patterns of publishing in the region. These patterns or “Arab ways of doing business” will be addressed in the following chapter.

Methodology

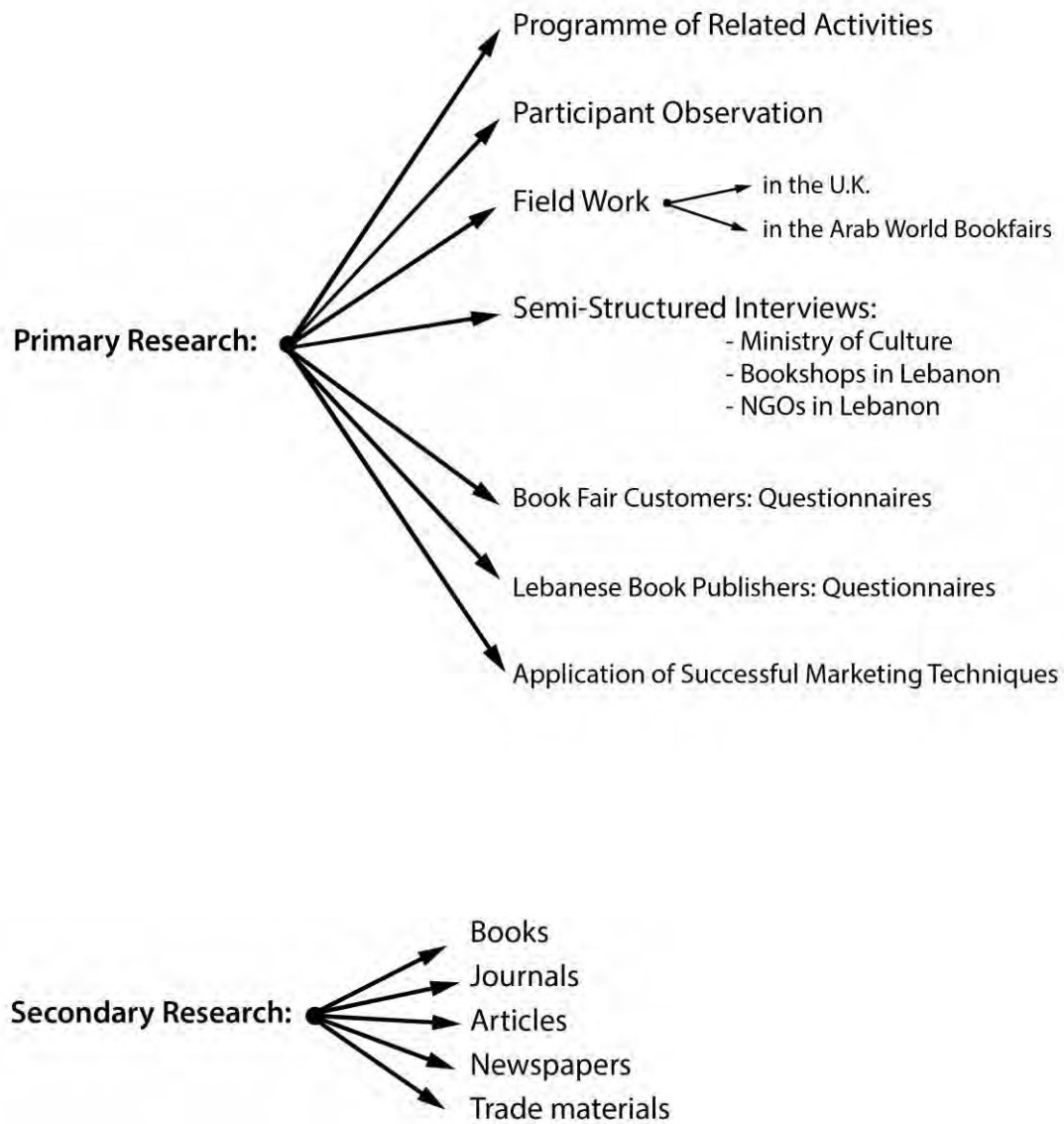


Figure 1: The Figure is a visual depiction of the chapter structure. It demonstrates the research methods used.

Introduction

To explore children's book publishing and especially marketing in the Arab World, diverse methods needed to be employed. Different steps were undertaken to understand publishing and marketing in the Arab World, and a close look at the UK publishing industry was necessary to set a context for comparison. This in turn set the background for the implementation of marketing techniques in the Arab World. In the Methodology I will explain the reasons for choosing the methods, discuss the constraints I faced, particularly as a female publisher and researcher in the region, and explore the different subjects covered. Field trips in both the Arab World and the UK set the bases for research. Publishers, customers, the Lebanese Ministry of Culture, NGOs, and bookshops in Lebanon were the main subjects covered in the research.

A three-tiered analytical approach was used to scope out the Lebanese children's book market. Desk-based secondary research was conducted in advance of fieldwork in Lebanon and across the region. Quantitative research took place during a series of international book fairs and participant observation at UK's children's books publishing houses. Qualitative research by way of informal semi-structured interviews and participant observation was conducted using online questions and face-to-face meetings with publishers and purchasers in Lebanon and across the Arabic-speaking world.

Three phases of iterated and mixed-method research were conducted to attempt to address the gap in data and information pertaining to publishing children's books in the Arabic-speaking world. Marketing books is a complicated process with many stakeholders and variables to consider. As both a publisher and a researcher, I found action research to be the most suitable methodology to examine the factors affecting marketing children's books in the Arab World. According to Thomas (2013, p. 33), in action research, the researcher studies her own practice. Thomas portrays action research as a coil along which the researcher moves, learning from each stage before the next step is taken (2011, p. 33). Researching the different stakeholders in publishing and marketing over an extended time frame was necessary to shape the research and modify it.

Schein (1996, p. 230) stated the importance of starting with an emphasis on concepts and methods of inquiry in order to come up with "ever-better theory". Concepts should be anchored in, and derived from, "concrete observations of real behaviour in real organizations ... that hang together and make sense", and can be studied and linked to

practitioners who are solving organizational problems (Schein, 1996, p. 230). Mapping the publishing and marketing of the children's books industry in the Arab World was necessary to define the concepts which needed to be studied. As discussed in the Literature Review and the Introduction, both Egypt and Lebanon are the main publishing capitals in the Arab World. However, Lebanese publishers concentrate on exporting their titles, while Egyptian houses are more focused on selling their books domestically.

The objectives of the Lebanese mapping were to:

- source information pertaining to the environment within which children's book publishers currently operate
- map the children's publishing market
- document existing Arab book marketing techniques
- establish the parameters for future marketing mechanisms across the region

This project's philosophy fits the phenomenological approach, since the social world of business is much more complicated than natural science, where the researcher is objective, independent, and neither affects nor is affected by the subject of the research. Unlike in the natural sciences, we find that "not only are business situations complex, they are unique. They are a function of a particular set of circumstances and individuals" (Saunders et al., 2000, pp. 85-86). Publishing and marketing in the Arab World in general and in Lebanon specifically are very different from techniques used in other parts of the world, with many factors affecting the process and results.

A deductive approach to this question, in which a theoretical framework is developed and tested using data (Saunders et al., 2000, p. 45), would begin with the fact that, when compared with other regions, fewer children's books than expected are sold in the Arab World given the population of children of reading age. For instance, most publishers in Lebanon print around 3,000 copies of each title and may take years to sell this quantity. By contrast, in the UK publishers can print 3,000 or up to half a million copies (for instance for Puffin's *Diary of a Wimpy Kid* series) (Allen, 2011) and usually are expected to sell most of the print run in the first year.

Several methods were needed to test this hypothesis and analyse the findings. The methods used in the research are both qualitative and quantitative. First, secondary, desk-based

research was conducted to frame the hypothesis. Primary and secondary literature was critically evaluated before engaging in fieldwork, over 18 months across both the Middle East and in Germany and Great Britain. Next, fieldwork was conducted, involving a series of semi-structured interviews with government officials, publishers, lawmakers and educators, all of which proved invaluable in determining the hurdles and challenges faced in publishing children's books in the Arab World. Being a publisher, participant observation played a main role in my shaping of the questions and mapping. Limitations of the methods used will be discussed under each sub-heading.

Secondary Research

The resources were selected according to their currency (date), relevance to the topic, author and reputation, quality of the content, and the strength of their arguments (Gillett et al., 2009, pp. 57-58).

The secondary research conducted to date has involved a series of methodological tools. Secondary sources have included a comparative analysis of the printed material and online published research, social media, special offers, book events and other schemes employed in the UK by publishers to market books. These sources proved valuable in developing secondary research material on marketing in general and marketing children's books in particular. Combined, these methods assisted in illuminating the data deficit and helped to identify the existing data on publishing children's books vital for establishing a methodology for my work in the Arab World. The secondary references included books, journals and articles, newspapers and trade materials.

Data about UK publishers was sourced from multiple virtual and physical locations during this project's research phase. The websites of Penguin, Walker Books and Scholastic Books were visited, as well as their Facebook and Twitter pages. For instance, Scholastic's website gave detailed information for parents and schools about their campaigns and book clubs. The reasons for the choice of these publishers (Penguin, one the largest children's book publishers in the UK, Walker, a medium-sized children's book publisher, and Scholastic, which uses innovative marketing techniques to schools), will be explained in the following section.

Regional instability in the Arab World undermines the capacity for comprehensive statistical analysis, particularly in markets where protracted conflicts challenge the book

business even more than other issues. Children's books are often seen as luxury items rather than essentials and, as a result, the incentive to track sales diminishes when conflict escalates (discussed in the Literature Review and Chapter One). As a member of the Book and Reading Committee in the Lebanese Ministry of Culture, I have worked and consulted with other members on researching children's publishing. For two years, from 2007 to 2008, the fourteen-member committee, which was made up of representatives from the different book sectors, examined the problems facing publishing. This experience laid the contextual groundwork for the current study, as the different sectors were fully analysed and discussed with specialists. The experience of working for an extended period of time with specialists from different sectors of the book industry helped in shaping the research question and pointing out the factors affecting publishing and marketing in the Arab World.

The most referenced books about publishing and the book industry in Lebanon (*The Book Publishing and Distribution* - 2010, *Arab Children's Books* - 2012, *The Third Arab Report on Cultural Development* - 2010, *What a Story: Children's Literature Today* - 2009, *A Study to Develop Books and Promote Reading* - 2009, *Book Production in Lebanon: A Study Done on the Occasion of 'Beirut: World Book Capital* - 2010) were consulted to provide background for the Lebanese publishing chapter. However, these books usually covered only a small part of the book industry. As a result, research from sources other than books referring to the Arab World had to be undertaken. To aid the search, key terms were used, including: population, traditions, habits, purchase, internet, development and economy. For example, to research online purchasing habits, I consulted materials regarding online banking and technological developments. The results are shown in the book fair section, and were used to analyse the respondents' replies from the different questionnaires and interviews in Chapters Three and Chapter Four.

As discussed in the Literature Review, book fairs are one of the main sales venues for publishers (the choice of book fairs will be discussed later in the following section). Information about the primary book fairs in the Arab World was gathered at various times during the research, with the fair websites serving as some of the main sources of information. Book fair website management teams display general information about the fairs, their objectives, and the exhibitors. These websites sometimes discuss the host country's initiatives to promote reading and books. A systematic review was conducted of articles relating to book fairs. National and international newspapers and magazines discussed the book fair launch events, particularly when the government or ministries were

involved. The information collected on Arab book fairs was also frequently used in analysing the consumers' replies in each of the fairs covered in the research.

General information about each country, including its population habits and education, was researched using the *Country Profile* and *Business Travel World* online resources, among others. The information was used in each book fair section to introduce the country and to help in analysing the data gathered.

Secondary research was important in shaping my hypothesis, to see the situation from many researchers' and writers' points of view, and to analyse my results. With the support of secondary research, my position as an Arab Lebanese publisher played a main role in producing my research question and giving the study a personal dimension related to my experience.

Primary Research

Participant Observation

Participant observation is a qualitative research method in which the researcher tries to find meaning and answers attached to actions (Saunders et al., 2007, p. 282). According to Saunders et al., the researcher participates in the subjects' lives and activities and becomes part of the group (2007, p. 283). As a publisher, I lead a life very similar to that of other publishers in the Arab World, especially in Lebanon. Most of the children's book publishers travel to the same book fairs, experience similar problems when dealing with distributors and shipping, and share a similar political instability. Being an Arab Lebanese publisher means that I have an inside view of the culture and ethics of the Arab World, can relate to how other publishers think, their backgrounds, and how business deals are done most of the time. In addition, as a publisher I receive information about the activities in the Arab World and international events, like book fairs and conferences, where I can get closer to the participants who sometimes reveal the marketing ideas or methods they use. According to Saunders et al., researcher observations allow one to get to the bottom of "what is going on" in a vast range of social activities (2007, p. 284). The authors emphasize that people change with the changing social circumstances (2007, p. 284) which highlights the importance of the research observer who recognizes the change. Publishing is a fast-moving industry, especially in "the West". As a result, many Arab publishers find

it necessary to visit international book fairs to learn about the new trends in publishing. The main book fairs that Lebanese publishers visit are the Frankfurt Book Fair, London Book Fair, and Bologna Children's Book Fair. As a publisher, I visit the main international book fairs, network with international publishers, and consider buying copyrights for translations. In my work as a publisher, I receive online and printed catalogues from many British publishers. The catalogues are usually sent before the main European book fairs: Frankfurt in October, in Bologna in March, and in London in April. The catalogues publicise new books, allowing for a comprehensive analysis of ongoing marketing research and the impact of marketing in the UK. The rapid development and change in titles and marketing techniques in the UK and many European markets is recognizable in the book fairs and marketing material. The noticeably gap between the fast-moving publishing industry in "the West" and the slower-moving publishing industry in the Arab World became more obvious during visits and contacts with Western publishers. Secondary research and participant observation were important in shaping the research question, deciding upon the methods to be used, and supporting and analysing results. Fieldwork in both the UK and the Arab World was necessary to complete the research.

Fieldwork

Fieldwork in the UK

Publishing in the UK is highly developed, with constantly evolving marketing techniques. In order to identify and compare the effectiveness of new marketing techniques used in Lebanon, fieldwork was conducted in the UK, which set a background for comparison with the Arab World. After visits to the book fairs and bookshops, and after collecting secondary data, it was important to visit the publishing houses themselves, to observe decisions being made and how marketing techniques are implemented. Questionnaires or interviews were not chosen as a method, since this approach would collect data that in the UK is normally already published and accessible. In addition, interviews with UK publishers are usually hard to obtain, and even if done, are usually brief. Being chosen as an international cultural leader by the British Council gave me the opportunity to spend around a week at Penguin Books. I reveal the purpose of my visit, which is important so that trust could be obtained and questions can be asked to enhance the researcher's understanding (Saunders et al., 2007, p. 287). The visits were made with many questions in mind:

- Is there a specific marketing team in publishing houses?
- How much emphasis is laid on marketing?
- What are the techniques used in marketing?
- What are some success stories?

A one-week internship at Penguin Books and a one-day visit to Walker Books were used to observe their marketing methods and conduct participant observation, engaging with publishers and their marketing departments. The amount of time spent at each firm was determined by the publishers themselves. Penguin was chosen due to its status as one of the leading children's book publishers in the UK and its many innovative marketing methods, while Walker Books was included in order to observe the techniques used by smaller players in the market. During the visits, I was able to identify how the marketing team was organized and how children's book campaigns were developed and applied. Samples of printed marketing materials were collected and online links were noted in order to be used in applying new marketing methods in Lebanon. According to Saunders et al., participant observation can threaten the validity of the project and spending extended time in observation can help overcome these threats (2007, p. 291). Since I was unable to spend extended time in the publishing houses, it was necessary to get a broader image of the marketing done online and through social media, since these are becoming important marketing tools. Competitions, for instance, are usually publicized and talked about online, through the publisher's website, Facebook and Twitter pages. This helped me to follow up on the marketing techniques necessary for the research and ensure the validity of the information.

For this study, numerous visits to UK bookshops were necessary to explore how British publishers deal with bookshops, what activities are carried out, how smaller sellers attract readers, and how niche children's booksellers survive in a very competitive business. Visits to chain and discount bookshops were frequently undertaken to observe the prevalence of promotions on titles, and special offers like the "3 for 2". Information relating to large chain bookshops and supermarkets was found and included in Chapter Six. I visited the Mostly Books store in Oxfordshire, where I interviewed the manager and collected information about his operations, how books are marketed, and how the store deals with publishers. The information gained from the bookshops will be used in

discussing marketing techniques used in the UK in Chapter Six. In addition, the results can set a base for comparison with the way bookshops operate in Lebanon in Chapter One.

Attending the 2012 UK Booksellers Conference, *Best of Book Marketing Showcase*, was highly useful since it addressed the new, successful marketing techniques, and included speakers from Hodder Books, Pan Macmillan, Vintage Books, Orion Books and others, highlighting the success stories and talking about processes. In addition, the conference hosted people from other domains like Nike shoes and sportswear to talk about their methods used, thus challenging publishers to apply new ways used by different types of businesses.

In order to understand how UK publishers sell their rights and highlight new titles, repeated visits were made to the London Book Fair. I have been visiting the London Book Fair since 1999 as a publisher. As an International Young Publisher of the Year (IYPY) in 2005, I was invited to investigate and have a closer look at the UK publishing industry by visiting different publishing houses, bookshops, and distributors over a two-week period. In addition, as an IYPY alumna I had the opportunity to join another tour in 2007 with fellow alumni. Held in April every year, the London Book Fair is one of the largest gatherings of the international publishing industry. During the fair, British publishers display their new titles, market their rights to international publishers, and market their books to distributors. Visiting the fair allows for direct investigation of new trends in the publishing industry, and sometimes enables one to understand a book's success according to the sales and rights sold by the publishers in the fair. The book fair also hosted panels and talks about the book industry in the UK and other parts of the world.

During the research, periodic trips to international book fairs and events were made to obtain a general view of publishing in the world. The visits included Frankfurt International Book Fair (2010, 2013), Bologna Children's Book Fair (2009, 2015), Leipzig Book Fair (2011) and a Finnish book tour (2009), among others.

Visits to the UK and other Western publishers and fieldwork on the international publishing industry needed to be analysed and compared to the situation in the Arab World. Lebanese publishers market and sell their books in many Arab countries, so it was necessary to visit and collect data in the Arab World. The next section considers the cultural specificities of marketing in the Arabic-speaking world and the methodology entailed in exploring them.

Arab business culture and negotiation practices differ from those in the West. According to the *Lebanese Country Review*, knowing one another and establishing trust and rapport between both parties is essential before starting business (*Lebanon Country Review*, 2012, p. 219). In addition, Kharkhar and Rammal (2013, p. 3) have referenced several studies to emphasize the importance of culture and communication in Arab countries, including Hall's 1996 study that classifies the role played by culture. According to Feghali's findings (1997), the three values found most often in Arabic literature are collectivism (giving priorities to groups over individuals), hospitality, and honour. In addition, Gudykunst and Ting-Toomey's (1988) findings on communication characteristics mention the "speaker's concealment of desired wants, needs, or goals during interactions (which) reflects 'musayara', an Arabic word that is used to describe the desire of the Arabs to be accommodating for the sake of harmony and avoidance of confrontation during negotiations" (Nelson, Al Batal, & El Bakary, 2002).

The characteristics of Arab business culture helped my work as a researcher in some ways and hindered efforts in others. Common taboos and cultural norms were taken into consideration while developing the questionnaires and addressing the children's book customers, the Ministry of Culture, bookshop managers, NGOs and publishers, for instance. Prior knowledge of many publishers and existing trust encouraged the sharing of information, while in other circumstances some publishers viewed pre-existing relationships and competition with my publishing house in regional markets as a threat and shared less information as a result. However, as a whole, being an Arab publisher gave me prior knowledge of the main book fairs in the Arab World and facilitated my visits to many book fairs in the Arab World.

Lynx (2014) has emphasized the importance of book fairs in the Arab World (discussed in the Literature Review and Chapter One), noting that because of "distribution problems between Arab countries and the lack of strong bookstores in some countries, book fairs have continued to occupy an important place in the Arabic publishing ecosystems". The Consultation and Research Institute (CRI) identifies that 82% of Lebanese publishers market their books in book fairs in the Arab World (2010, p. 89). Though book fairs are particularly significant for publishers in the Arab World, they are different from international fairs like Frankfurt and London (discussed in detail in Chapter Five). Arab book fairs are a primary forum to sell books to the public, due to the lack of stores and reliable distribution (discussed in the Literature Review). Publishers usually bring large

quantities of books to fairs, to sell directly to the public or distributors, since bulk shipments reduce costs. In addition, there are often more lenient rules on the books entering the country when they are sent to a book fair. For example, books sent to the Saudi Arabian book fair are checked on site, while regular shipments to Saudi Arabia require specific approval from the authorities.

General information about the book fairs, which was noticed during the visits, was recorded. The main book fairs that publishers take part in were chosen and many smaller ones were not included in this study. The difficult political situation and instability in some countries played a major role in excluding some book fairs. A list of international book fairs by the Lebanese Publishers' Syndicate was used as my guide to choose which book fairs to include in the study. This list is sent to publishers twice a year (the list of 2013/2014 Arab book fairs is in Appendix A). The data collected from book fairs was used to analyse the data gathered from customers.

The book fairs visited and included in this study were the Abu Dhabi International Book Fair, the Algeria International Book Fair, the Beirut International Book Fair, the Doha Book Fair, the Kuwait International Book Fair, the Muscat International Book Fair, the Sharjah International Book Fair, and the Tunis International Book Fair.

Due to the political situation in the region following the Arab Spring, it was impossible for me to visit certain cities that were not safe. The Sana'a International Book Fair, Tripoli International Book Fair, Cairo International Book Fair, Baghdad International Book Fair, Bahrain International Book Fair, and Palestine International Book Fair were excluded from the research for safety reasons. In addition, it is impossible for a Lebanese citizen to visit a Palestinian city due to Israeli control of the Palestinian borders. The Casablanca Book Fair, Djibouti Book Fair, Irbil International Book Fair, and Nouakchott International Book Fair were excluded since they are rarely targeted by Lebanese children's book publishers due either to the very low purchasing powers or minimal interest in Arabic children's books. The Kingdom of Saudi Arabia is a very important market for Lebanese publishers but it is difficult to obtain permission to participate in its book fair. In addition, women are not supposed to sell or attend the book fair as professionals. Visas to Saudi Arabia are difficult to obtain and a woman must be accompanied by a male relative. All these reasons made it difficult for me to include Riyadh International Book Fair in my research.

General information about the book fairs and the specific factors affecting their success needed to be collected. There was a narrow choice of available methods to study the Arab book fairs. Information needed about the fairs included how the fair is managed, which publishers take part in it, where the fair venue is located and how accessible it is to the public. Other factors included are: who visits the book fair, support given to the publishers, and who visits the children's section. This information would have been difficult to collect via questionnaires, interviews and secondary research since book fair management teams are usually either reserved or biased about the information they provide, and try to show that their own specific book fair is better than others in the Arab World. Moreover, it is very difficult to meet the managers in Arab book fairs due to the large numbers of people trying to talk to them. In addition, publishers can view the book fair differently, depending on their sales and location at the fair. For instance, visitors can visit one section of the fair and not another, thus affecting the sales of publishers displaying in some locations of the book fair. Empirical research, visiting each book fair in order to learn more about it and create a comparative cross state analysis, was used to assemble the data. Printed materials and book fair event schedules were collected. Book fair hall plans, management, and the attendance of the general public, if available, were recorded and assessed.

These empirical qualitative findings were supported by quantitative research such as questionnaires and sample surveys of children's book publishers across the region. Cover letters explaining the study's purpose were sent to the interview subjects and the publishers along with the questionnaires. Dilman has shown in his research that messages in cover letters affect the response rate (Saunders et al., 2000, p. 303). As a result, the cover letter in the investigation included different elements such as an explanation of the research, the use of the results, the anonymity and confidentiality of the data, and contact information, which is also needed for ethical reasons.

The focus of this publishing study is on the customer, "[o]ne who decides on payment of a product", rather than the consumer, "who obtains the benefit of the product", according to Saunders definitions of each (Saunders et al., 2000, p. 728). When selling children's books, the customers are mainly parents and schoolteachers, while the consumers are children whom I did not interview for ethical reasons. Accordingly, customers are the main targets in book marketing. Baverstock created a checklist for "achieving good marketing", where her first recommendation was concentrating "developing a customer orientation so that their needs, wants, and values are prominent in your thinking" (2015, p. 8). When book markets are discussed in the Arab World, these markets are seen mostly in relation to the

publishers, ministries, bookshops and schools. Minimal attention is given to the way in which customers approach books. In addition, book fairs are the main events that publishers seek to take part in to market and sell their books every year. There has been very little research in the Arab World examining the patterns and purchasing habits of individual book customers.

According to Thomas, a survey where information is collected from as many people as possible, using questions that can help the researcher investigate attitudes and situations, is of vital importance (2011, p. 44).

In the Arab World as in any other market, there is an urgent need to understand customers and see the situation from their point of view. What if the publishers are mistaken about what is needed? What if the customer approaches books in a different way? What attracts them to books? Why do they buy them?

The most sensible and easy way to locate book customers is during a fair, when they pass next to the children's book stand, or after their purchase. This is one of the accurate ways to identify a customer. For the data to be accurate and reliable, a large number of the questionnaires were needed to arrive at a general conclusion or to locate a trend or attitude. As a result, questionnaires from at least twenty and up to 100 respondents were needed, though it is difficult to persuade people to take part in focus groups since their time is limited at the fairs. This is especially true of teachers supervising a group of children or parents with their children.

In order to understand book customers in the Arab World, questionnaires that determined specific information about book customers were developed and surveys conducted at some major Arab book fairs. Prior to commencing the study, in 2011, ethical clearance was sought from the university. Interviews were conducted to determine who buys books for children, the age group that children's books are for, the kinds of books that the public seeks to buy, where they find new books, where they buy their books, and why specific books are bought.

Respondents were asked about their attitudes and opinions towards buying books. To ensure the reliability of the questionnaire, "test re-test" estimates of reliability were obtained, where several respondents were interviewed again after one month, resulting in improved consistency of responses. The design of the questionnaire was based on the information required from consumers. Bell highlights the importance of going back to the

hypothesis and objectives of the research to decide on the questions (2001, p. 119). The questions were standardized to be interpreted by respondents in the same way. Questionnaires with specific closed questions were distributed, since the data resulting from those questions can be easily collected, recorded and interpreted. Accordingly, to avoid ambiguity, the questions included ranking and quantity number which are easy to analyse and interpret. Double questions, presuming questions, memory questions, knowledge questions, hypothetical questions and offensive questions were avoided to ensure maximum involvement by participants and an easy analysis of their answers (Bell, 2001, pp. 120-124). Bell points out that offensive questions and questions covering sensitive issues, such as asking for the age of participants, can be avoided by giving age categories with no overlapping categories (2001, pp. 124-125). As a result, the questionnaire gave categories for book consumers to choose from. The results were recorded and compared with the publishers' views. The questionnaire was fitted on to an A4 page so that its brevity would entice responses from participants. This is all the more pertinent when the adult respondent is accompanied by a child, and Bell suggests that the layout plays an important role in encouraging the recipients to answer (2001, p. 125).

During their visit to the book fair, visitors examining children's books on the Asala Publishers' stand were asked if they wished to participate in research about marketing children's books. The questionnaires were interviewer-administered, where responses were recorded based on the buyers' answers. While filling in the questionnaires, adults were offered help in understanding each question and shown samples of different kinds of books. Further explanation of any question was provided if the adult had a problem answering.

As a researcher and book publisher/seller, I had less power to persuade interviewees to answer the questions, which gave them the freedom to refuse to participate. On the other hand, the anonymity of the questionnaires encouraged the respondents to answer the questions. I introduced the study's objective to find answers and data in the book publishing industry, in order to be able to understand what the buyer wanted, which would hopefully help produce books that address the buyers' needs.

A sufficient number of people were required to answer the questionnaires in order to get reliable data and statistics. 50 to 100 copies of the questionnaires were designed to be filled in at every book fair. The number of completed questionnaires varied at each book fair;

one in Beirut, twenty-two in Tunis, twenty-nine in Algiers, twenty-five in Doha, and forty-five in Muscat.

It is worth noting that customers with more than one child (such as Kuwaiti customers), choosing more than one answer was taken into consideration counting their different choices. In addition, very few customers ranked their choices. In the book fairs where customers ranked their choices (Sharjah and Algeria) the ranking was taken into consideration by giving more points to the first choices (three points were given for the first choice, two points were given for the second choice, and one point was given for the third choice) thus taking the ranking into consideration. In Chapter Five, the analysis chapter, only the first choices were counted and analysed in order to give the ranking a value.

Limitations

Bell specifies that the number of subjects in a research project depends on the amount of time that the researcher has (2001, p. 126), and this proved true in the process of distributing the questionnaires. Visits to Arab book fairs were made over several days in each case. As a result, lack of time was a huge restraint, since out of five or ten passers-by, sometimes only one might agree to fill in the questionnaire because their children needed supervision or they did not have enough time. In addition, on weekdays and at specific times, very few people visited the book fair.

For several reasons, in many countries it was not possible to collect data from male participants; fewer men passed next to the children's book stands, and if they had their wives with them they preferred to let their wives answer. Traditional separation between males and females in most Arab countries was a variable factor where in some situations it was a limitation in interviewing male respondents while in other situations it gave me the advantage to talk to mothers, teachers, educators, and personnel in the Ministry of Culture who were mainly female. In some countries like Qatar, Tunisia, Algeria and Kuwait, a smaller number of completed questionnaires were received. This was due to a lower number of people visiting the book fair, the number of people passing next to Asala Publishers' stand, and/or people refusing to participate in the questionnaires. As a result, further data collection and investigation are required to arrive at more accurate conclusions on the buyers and books in those markets.

One of the limitations of the questionnaire was that some respondents were hesitant to ask for further explanation about the types of books. This meant that some respondents chose “baby books” as a safe question to respond to, because in Arabic “baby books” refers to young children's books and is a “catch-all” phrase covering most of the genres of books. This makes it difficult to disaggregate the data on age range from baby to toddler to teen. To address this issue, the reliability of this question was tested with relevance to the question where the respondents were asked about the age of the child they were buying for and sometimes it did not fit the “baby books” age range.

If governments accepted our request, a visit to the Ministries of Culture or Education in the Arab countries was made to talk briefly about their future plans, especially related to book purchase and reading promotion. The ministries’ vision and future plans can be a sign of the growth of the market, especially if their future plans concentrate on promoting reading and books. Ministry personnel accepted my visit as a reputable publisher in the Arab World; however it was difficult to make longer visits, to have questionnaires answered, and to obtain semi-structured interviews.

In Lebanon, investigating the roles of the Ministry of Culture, bookshops, and reading-promotion NGOs can help to draw a wider picture of the market, reading, and the children’s book in Lebanon. The research recognized the different roles that these organizations play in the book industry and how they viewed the situation from different perspectives.

Semi-Structured Interviews

Interviews are discussions with others with a purpose in mind. Semi-structured interviews, a “happy medium” between unstructured and structured interviews, were chosen since the meeting can be controlled by specific themes or topics that would lend order to the proceedings (Thomas, 2011, p. 49).

In order to achieve a fuller understanding of the book industry and reading in Lebanon, semi-structured interviews were organized with the Ministry of Culture’s book department, the main bookshops, and the NGOs that work on the promotion of reading and books. Meetings were scheduled with each organization’s leaders, who were asked prepared questions. Semi-structured interviews were chosen since the questions allowed the

respondents to deviate from the script if they wished, giving a specific opinion, explanation, or attitude towards book marketing, publishing and reading habits in Lebanon. Semi-structured interviews provide greater scope and clarity and allow the researcher to expand the remit of the research should the interviewee disclose material pertinent to the overall study but not immediately apparent prior to fieldwork. For example, minimal governmental support of children's books can impact on a publisher's willingness or ability to spend time and effort on sales and marketing activities.

Ministry of Culture

The first semi-structured interview was done with the Lebanese Ministry of Culture, to collect information about the ministry's main activities, its support of children's book publishers, and view of the book industry. The questions were emailed to the ministry beforehand, then discussed and answered during a semi-structured interview. The head of the book department in the Ministry of Culture in Lebanon was contacted. The respondent made very brief answers to my questions, explaining that the ministry had no statistics available and, in addition, that he preferred that his personal opinion not be included. In this instance the data deficit was compounded by the bureaucratic preference for anonymity.

Bookshops in Lebanon

The second set of semi-structured interviews was directed at the main bookshops in Lebanon, in order to understand how they buy their books, how children's books are displayed, how promotional activities were implemented in the bookshops, and how their relationship with publishers can be developed. There are hundreds of shops in Lebanon that call themselves bookshops but many primarily sell stationery, newspapers and toys. These shops were excluded from my research. I relied mainly on the bookshops that stock books for the general public, as well as for school curricula. Most of the five bookshops interviewed were in Beirut. As a publisher, I drew upon my experience in selling to bookshops to determine the ones interviewed. In addition, I asked for advice from other publishers regarding other bookshops to include. Bookshops were visited and questions were responded to by the managers.

The third set of semi-structured interviews was directed at the three main NGOs in Lebanon which work on the promotion of reading and books: the Lebanese Board of Books for Young Children (LBBY), Iqraa Association, and Assabil Association. It was vital to include these three stakeholders in the research, since their policies and activities can affect and develop the book industry. The choice of NGOs was based on my experience in the field. Over the last fifteen years, meetings and events related to books hosted by the Ministry of Culture, publishers, international cultural centres, and public libraries included these three NGOs especially. A meeting was arranged with the person in charge to discuss the questions. The aim of the questionnaire was to find out the NGOs' main activities related to children's books, their success stories, and their opinion on how the local book industry could be developed.

The results from the semi-structured interviews in Chapter One were compared with the results from research and questionnaires completed with the publishers and book consumers. The results were analysed, synthesised and evaluated - see Chapter One.

Approaches to Lebanese Publishers

Publishers are the main actors in the book industry. Gillette et al. describe the publisher's role as a "director-general of the whole enterprise of publishing", where the publisher finances the publishing process while taking risks (2011, p. 15). Gillette et al. find that a "publisher has the power of decision, with elements of open and hidden censorship built into the role" (2011, p. 15). The choice of books published, the markets aimed at, and the marketing techniques used are all based on the publishers' choices.

Lebanese publishers are a primary source of Arabic language books in the Arab World. Children's book publishing is a thriving market in most of the Gulf States when compared with the longstanding and more mature publishing environment in Lebanon. According to Bashour, Arabic children's literature has been developing since 1990, and the industry is concentrated in Egypt, Lebanon, and Tunisia (2012, p. 23). The second area of growth is in the Gulf States where the education sector is shaping the further growth in non-formal education sources, namely children's books.

Finding accurate and up-to-date statistics on the number of children's book publishers in the Arab World is challenging. There is a data deficit concerning companies that primarily

focus on children's publishing (discussed in the Introduction and Literature Review). Profit-sensitive figures are difficult to obtain, as publishers keep their figures and profit margins private. To address the data deficit, and fill the gaps in the existing research in the region, I monitored the Arab Publishers' Association website. Although this organization shares information about its members, it does not specify which publishers are children's book publishers. The Association comprises 141 Egyptian publishers, seventy three Lebanese publishers and fifty two Jordanian Publishers. These houses produce across all book genres, not only children's books (www.arab-pa.org, 2014). The website for the largest book fair in the Arab World, the Cairo International Book Fair, does not contain specific data or lists of the publishers. Indeed, the website fails to provide a list of publishers exhibiting at the fair (www.cairobookfair.org, 2014). Missing statistics and missing participants hinder researchers' capacity to map the activity, productivity and profitability of publishers across the region. On the Egyptian Publishers' Association website, there are 503 listed members, eleven of which are children's book publishers (when you choose the category children's books the search limits you to eleven publishers under this category). In order to belong to the association, the publisher needs to have five years' experience with "appropriate" lists of books, to have Egyptian citizenship, a good reputation and capital of 2,000 Egyptian pounds (around US \$3,500) (www.egyptianpublishers.org, 2014).

The Abu Dhabi Book Fair is increasing in importance as a "must attend" fair in the Arabic-speaking world, since the government allocates substantial funding and some subsidies to encourage publishers to purchase stands. The book fair is very well organized. Strict regulations are imposed on participating publishers, such as the prohibition of the sale of toys and other non-literary material. Limiting the fair to books is critical for book sales, as the availability of toys often distorts total sales and impacts publishers negatively. Despite its efficiency, the Abu Dhabi Book Fair nonetheless has a data deficiency of its own, which hinders effective mapping of children's book sales. For example, exhibitors are not classified according to specialisation or genre. Data is not disaggregated and publishers are not classified by country of origin or operation (www.adbookfair.com, 2014).

The most effective source of information on children's publishers in the region is the Arab Children's Book Publishers' Forum (ACBPF). Launched in 2008, the ACBPF emanates from the Arab Publishers' Association and was created as a "specialized professional entity" whose members should have no fewer than twenty-five published titles (www.acbpub.org, 2014). Out of the eighty publishing houses in the ACBPF in 2014, the children's book publishers include twenty-five Egyptians, twenty Lebanese, seven

Jordanians, two Emiratis and four Tunisians (see Appendix B). The forum presents articles about children's books, in addition to activities and literature to educate publishers on developments in the Arab World.

The statistics from the Arab Publishers' Association, book fairs, and Arab Children's Book Publishers' Forum highlight the importance of Lebanon as a main source of books in the Arab World, in addition to other reasons that will be discussed in the following section.

In order to create a tangible baseline for study, this research focuses primarily on the Lebanese children's book publishing market. This selection is based on the fact that the Lebanese publishing industry is the most successful and progressive in all the Arabic language markets; although Lebanon's population is only five million, the country accounts for the lion's share of publishers and sales per capita. According to CRI, 3,000 to 4,000 titles were released annually in Lebanon in the four years before 2010 (2010, p. 44). In addition, Lebanese publishers are major book producers for the rest of the Arab World, rivalling their Egyptian counterparts who market and sell predominantly to their domestic population of 90 million people.

According to the CRI, 21.9% of the children's books sold in the Arabic language market are Lebanese children's books (2010, p. 87). Just over one-fifth of the titles produced by Lebanese publishers are sold in Lebanon, with other titles comprising 78.97% of all products are sold to international markets (2010, p. 86).

In the past decade, children's publishing in Lebanon has increased, placing Lebanon at the forefront of the regional industry. According to the Books and Reading Committee (BRC) in the Lebanese Ministry of Culture, Lebanese publishers sell 90% of the books sold in the Arab market (2009, p. 18). Legislation and the legacy of liberal freedom of expression laws in Lebanon have assisted in the development of publishing in the country. Increasing regulations and legal restrictions in other parts of the Arab World have, over time, led to publishers and printing houses relocating to Lebanon (CRI, 2010 p. 1). As a result, the study of Lebanese publishers broadly and Lebanese children's book publishers in particular is key to understanding the children's publishing environment in the Arab World.

A list of the book publishers was requested from the Syndicate of the Publishers' Union in Lebanon. Then publishers were contacted and asked about their list of books. Publishers with twenty or more titles on their lists were included in this research. During the Beirut International Book Fair, extensive search and observation was done to make sure that all

the key children's publishers were included in the research. In addition, during the fair, catalogues of the publishers were collected and contact details were noted.

To address the data deficit and effectively map the success of the Lebanese children's book publishers and their marketing across the region, this study followed a mixed methodological approach adopting qualitative and quantitative research methods. The research focuses on a core case study of marketing and publishing of children's books in Lebanon, in a broad regional comparison with children's book publishing in the greater Arab World. A sole case study approach, viewed here as "an extensive examination of a single instance of a phenomenon" (Saunders et al., 2007, p. 68) and "a study of one thing in its entirety" (Thomas 2011, p. 35), was not adopted in this research because the research demanded a wider perspective from which to address the publishing environment and numerous marketing mechanisms employed across the Arab World. The Lebanese case provides an invaluable indicator to the future direction of publishing and marketing of children's books in the region. A comprehensive assessment of the Lebanese market is a necessary but insufficient source of evidence. Identifying the existing children's book market and publishing environment is a necessary but incomplete measure of analysis without a broader regional comparison. To that end, the research adopts quantitative and qualitative analyses within Lebanon and across the Arabic-speaking world. Quantitative analysis and survey data was used to understand the current Lebanese children's book publishing market. Mapping existing publishers and their marketing techniques provided insights into the operational framework within the domestic Lebanese children's book market and the broader regional marketing mechanisms.

A three-tiered approach was used to scope the Lebanese children's book market. Firstly, the publishers were identified through secondary and desk-based research; secondly, a questionnaire was compiled; and thirdly, phone calls and visits were carried out to confirm the data collected in the questionnaires.

It is very important to understand the organization under study; without this information it would be possible to make mistakes and collect useless data (Saunders et al., 2000, p. 284). Consequently, collecting information about the publishing house, its markets and marketing methods was mandatory for this research. The three-tier approach used follows Schein's three levels. According to Schein (1992), organizational structures operate on three levels: visible information, espoused values including the mission statements, and the underlying assumptions (Saunders et al., 2000, p. 86). Firstly, visible information about publishers can usually be found in catalogues and in presentations at book fairs and

bookshops, as well as on social media. Secondly, espoused values are sometimes mentioned on the publisher's website, catalogue, or Facebook page. While the values or mandate of a publishing house are not always codified, espoused values can be deduced from the publisher's list of books and genres. Thirdly, underlying values or subjective assumptions are more opaque and difficult for the researcher to determine. Assumptions made by publishers about the development of business, the markets, and future plans can affect the way they publish and market their books. As a result, following up on publishers' development through book fair presentation, marketing and social media can give some clues and information about publishers' hidden assumptions. Researchers need to build trust and inspire confidence for publishers to reveal economically sensitive information pertaining to marketing strategies and profit margins in a competitive environment.

To this end, the study integrates qualitative research techniques adopting the multiple methods approach of Saunders et al. (2000 p. 99) to ensure triangulation, "referring to the use of different data collection methods within one study in order to ensure that the data are telling you what you think they are telling you" (p. 99). Consequently, secondary sources were consulted, including data collection through catalogues and social media and websites. In addition, phone calls were made and interviews were conducted to ensure that the information collected was reliable.

The information about Lebanese book publishers could have been collected in several ways, including: secondary resources, data collection through catalogues and social media, interviews, focus groups, and questionnaires. The methods used in this research to investigate the Lebanese publishers incorporate secondary resources, questionnaires, and survey data.

Interviews were difficult to obtain and were appropriate when dealing with policy makers, decision makers and legislators. Interviews with publishers were also difficult to secure because of the market sensitivity of the material requested. According to Kahn and Cannel, an interview is a purposeful discussion (Saunders et al., 2000, p. 242). Since it was sometimes difficult to have discussions with publishers, due to my position as a competitor in the market, using questionnaires was an alternative to interviews in which the respondents were free to only answer the questions they were comfortable with and only disclose the information they wished.

Focus groups were not adopted as a method for several reasons. Publishing is a competitive business in the Arab World, where it is considered unethical for publishing

houses to poach titles, illustrators and authors. A study of how a focus group would act in a certain situation, where the researcher becomes the facilitator for discussions, is highly affected by the group psychology (Thomas, 2011, p. 51). Su (2014, pp. 88-89) quotes Fritz et al. And Strong et al, when stating that “businesses can also increase stakeholders’ trust, satisfaction and commitment when business ethical values and behaviours fulfil their expectations”. As a result, focus groups were not adopted in this research since the presence of children’s book publishers with similar titles and themes might well have raised concerns with participants, resulting in less sharing of information than is needed for this research.

Questionnaires were adopted since they presented a safe medium for publishers to take their time, collect the data, have a choice of accepting or refusing to answer, and send the questionnaires back according to their own schedule. What was needed from the publishers was specific information on four levels: the publishing company, the market for the children’s books, marketing techniques, and the future, which made the use of questionnaires an ideal way to collect data.

The research conducted in Lebanon provides a single case study analysis of a broader publishing phenomenon in the Arabic-speaking publishing world. The environment shapes the access of marketers to their buying public where customers are often culturally specific. The use of questionnaires in this project illustrates the cultural specificities of researching publishing in the Arab World.

After deciding that the questionnaire was the best method to collect information from publishers, its design was set to include the information needed for the research. Bell emphasizes the importance of selecting question types, writing the questions, designing and piloting, distributing and returning the questionnaires (2001, p. 118). Several attempts at wording were made with the supervision of the project’s academic advisors. It is very important to remove ambiguity, so that the respondent understands exactly what is wanted (Bell, 2001, p. 119). Bell shows that more structured questions create fewer problems at the analysis stages (2001, p. 120). As a result, in the publishers’ questionnaire, questions included ranking questions (for marketing techniques and markets for instance), quantity questions (for number of employees, print runs and book genres and format), and grids (book fair and market sales). The options that the publishers were asked to select from were chosen based on the publishers’ catalogues and previous market survey. For instance the genre/format division for the books published was chosen based on the publishers’ catalogues and websites. The questions, worded precisely, specified the categories that the

respondent had to select from in order to avoid ambiguity and to help more respondents answer the questionnaires, since some might decide to abandon the questionnaire if they did not know the answers to some questions (Bell, 2001, pp. 121-123). The questions were standardized questions, which according to Robson (1993) can be interpreted in the same way by all respondents (Saunders et al., 2000, p. 279). Open-ended questions, giving the respondent the space to answer based on his knowledge and feeling in several ways, were not used since they might have allowed publishers to limit their answers if they so wished. Standardized questions were chosen, providing different options to give the respondent the feeling that the methods the publisher uses were already studied by others, in addition to pointing out methods that the publisher might have forgotten. One of main rules of designing the questionnaires is asking for only one piece of information for every question (Thomas, 2011, p. 56). Closed questions were chosen, where the respondent answers one or more of the alternatives. Bell noted that memory can play “tricks”, so the subjects were provided with lists to answer from (2001, p. 122). In addition, the questionnaire did not include presuming questions and hypothetical questions since these types of questions can create errors and be hard to analyse.

The publishers’ questionnaire was developed to research the publishers’ point of view and to investigate the different methods they used to market their books. Prior to sending it off, it was tested to discover how long it took to fill out, to check if the questions were clear, and to remove any questions that would yield unusable data (Bell, 2001, pp. 127-128).

The questionnaires were self-administered, in which respondents completed the questions and returned them by email, since they required numbers and statistics from the publishers. For instance, the questionnaire included questions about publications during the past five years, in addition to statistics of sales percentages in the market. Knowing their publication statistics for that period would reveal their development through the number of titles produced and the most common genres and formats. Bigger publishers with longer lists could be identified, and their techniques were compared with smaller publishers with shorter lists. In addition, collecting data about the different sales in local and international book fairs helped to identify the markets that the study would concentrate on through visits to those fairs and data collection from book buyers.

Limitations

It was difficult to obtain replies and feedback from publishers. Personal contact and meetings with them in the book fairs were initiated to explain the project. All publishers asked me to email them the questions so that they could take their time in replying.

Respondents needed encouragement to return the questionnaires. They were reminded by phone once a fortnight. It took many publishers up to a year to send the questionnaires back. Out of twenty-one firms that I categorized as the main children's book publishers in Lebanon, I was able to get a response from only nine. Eight publishers refused to fill in the questionnaires. Often publishers requested that I send them the questionnaires, and after many phone calls and promises from the publishers to fill in the questionnaire for more than six months, they decided not to take part in the research.

Publishers might have kept postponing returning the questionnaire in an attempt to be polite and not refuse outright. My persistence in collecting the data and the constant reminder phone calls ended when they revealed their intention of not being willing to answer the questionnaires. Publishers might have refused to answer the questionnaires for several reasons: the competitive nature of the business and their unwillingness to disclose information, the time needed, the difficulty of collecting data which many of them did not have or could not collect because of small teams or absence of experience or knowledge, or simply because they believed that the research was of no importance. This range of possible reasons is reinforced by the following observation:

The polite way for an Arab to say no is to say, "I'll see what I can do," no matter how impossible the task may be. After the Arab has been queried several times concerning his success, an answer of "I'm still checking", or something similar, means "no." Such an indirect response also means "I am still your friend, I tried". (Higgins Research Center, 2014)

One of the limitations of the publishers' questionnaires was that some of them did not read the detailed explanation of the genres of books so publishers, like the customers in the book fairs, had a problem categorizing books under "baby books". As a result, follow-up phone conversations, in addition to checking their online catalogues, became necessary to collect accurate information about the genres and formats of books they published, correct the data gathered, and ensure it was reliable.

My position as a publisher hampered my research, giving me less power. Publishers were wary of providing the material I needed for research for fear that I might use it as a competitor in the market. Thus they procrastinated about replying, skipped questions, and often did not share information.

To ensure that sufficient and reliable information was collected, the different sections of the questionnaire were followed up and re-tested in several ways. For the first section about the publishing houses, including information about formats and genres, the use of

catalogues and phone conversations was necessary to confirm the data. Travelling to many of the book fairs and countries was done to follow up on the publishers' markets. The marketing techniques used were verified by checking the market through my school visits, book fair visits, bookshop visits, social media, newspapers and television. The questionnaires were collected at the beginning of 2012, giving me time to follow up on the publishers' future plans, including print-runs and marketing plans for a couple of years after the questionnaires were collected.

Schein recognized the importance of individual differences in social phenomena and of observing a phenomenon for a length of time before understanding it (Schein, 1996, p. 230). Publishers have interpreted the importance of the questionnaire and their involvement in different ways. To observe the publishers for a period of time and understand individual differences, follow up and observation of the publishers' marketing techniques were carried out throughout the study.

Questionnaires (see Appendix E) included general information about the publishing house, their lists, their marketing techniques, their publishing policies, future plans and their markets. The results were discussed, compared with the consumers and bookshops' point of view, and analysed.

The Application of Successful Marketing Techniques and Results

This dissertation seeks to provide recommendations, based on the many steps taken to develop the children's book market in Lebanon, on new marketing techniques that Lebanese publishers can use to develop the children's book market across the Arab World. Baverstock has demonstrated that marketing is about offering "the right people, the right product by saying the right things in the right way, at the right time and in the right place" (2015, p. 9). Many factors, affecting marketing, vary as the product and the place that the book is marketed in change. Minimal studies have been found on effective marketing techniques in the Arab World, in contrast to the wealth of information on British marketing techniques. In order to compare the marketing techniques used in the UK with those used in the Lebanese market, a deductive approach to research was chosen where the application of some techniques used by UK publishers was necessary to test the results in Lebanon.

The experiment has to look at all the possible factors or variables that might affect a situation and then by "changing one—and only one—of them while holding everything else constant to assess the effect of your one change" (Thomas, 2011, pp. 40-41). What the

researcher is interested in is the outcome, the dependant variable, and the effect of the change (Thomas, 2011, pp. 40-41). According to Silverman, the design of experimental research should be designed with two groups, one of which is the control group (2005, p. 116). In this study, the variables are the marketing techniques that are applied to a specific number of books in order to evaluate the outcomes which would be the impact on sales.

Firstly, the research compared British techniques to those employed in the Arab World. Numerous successful marketing techniques used in the UK, but not in Lebanon, were recorded during the visits to UK publishing houses, bookshops and conferences, in addition to those used/cited in the Literature Review. Secondly, applicable techniques were recorded and applied to the Lebanese market. Asala Publishers, which I manage, applied some of those techniques and recorded the effect over a one year period. In Asala, books are published in categories based on size, price and genre. A book was chosen from each category and a certain marketing technique applied to it.

Baverstock has listed steps and ideas that marketers can follow in drawing up a book marketing plan. The steps are: entering into appropriate databases, website entry, an advanced information sheet, inclusion in catalogues, advertising, dispatch of covers to major bookshops and libraries, and salespeople (2015, pp. 124-126). Baverstock also emphasizes the importance of researching the market by exploring the market for the right audience, segmenting, targeting, and positioning, and knowing what the market is like (2015, pp. 118-119). In the Arab World, the results of applying different marketing techniques on children's books and recording results on sales have not been documented before. As a result, several UK book marketing techniques were applied and studied in the Lebanese market for the first time by Asala Publishers for this dissertation following Baverstock's steps.

Sales and feedback were recorded during a period of time ranging from a month to six months, and the results were compared with those from similar books in the series that were not marketed in the same manner. Some techniques were followed and results recorded over a shorter period of time for seasonal books, book fair offers, and bookshop offers, or after the advertisement had been placed for a month.

Marketers should "allocate a budget" to know how much the marketing campaign costs (Baverstock, 2015, p. 129). In applying the marketing techniques, it was necessary to study the budget spent and compare it against the sales and revenue in order to evaluate success. The more money spent on a marketing technique, the higher the sales expected to cover the costs.

Books According to Age Groups

Asala Publishers publishes picture books and activity books for children. Books are usually divided according to age groups by Asala and many other publishers and educators. These divisions are based on the child's development levels using (1) on Jean Piaget's stages of cognitive development: the "sensorimotor stage" ages 0-2; the "preoperational stage" ages 2-7; the "concrete operational stage" ages 7-11; and the "formal operational stage" ages 12 and up (JeongChul, 2011, p. 2). In addition, (2) J.A. Appleyard's (1994) division of the roles readers take were used: "early childhood: the reader as a player; later childhood: the reader as hero and heroine" ages 5 -10; adolescence: the reader as thinker; and "college and beyond: the reader as interpreter". These divisions are also based on the age groups in schools. For example, in most Arab countries children enter preschool at the age of three, move to elementary at around seven, and to intermediate at around ten or eleven. At each level, books are characterized by a similar number of words and illustrations.

1. Baby books (age 0-3)
2. Beginner readers (age 3-7)
3. Elementary level readers (age 7-9)
4. Intermediate level readers (9-12)
5. Young adults (age 13 and up)

Based on the results, comparison with the UK market was made and data analysis was performed to point out successful practices. To test the results on sales, books of the same format, price and author were chosen. Titles, illustrators and topics can have an effect on sales. These variables cannot be controlled and may affect the sales of some books. To control the results, the marketed books were compared with more than one title.

Limitations

According to Baverstock, publishing in the UK is "largely run by marketers" (2015, p. 6) and there are numerous marketing techniques applied by UK publishers. It would be impossible to apply all the techniques used in the UK in the Lebanese market, since the place, product, time and culture are different. As a result, the choice of techniques was limited to the popular techniques that can be applied and tested in the Lebanese market. For instance, Christmas campaigns and offers on books would be difficult to do in Lebanon and the Arab World since the majority of Arabs are Muslim. There are no wholesalers in the Arab World, so applying marketing techniques towards wholesalers has not been undertaken.

Conclusion

A variety of qualitative and quantitative methods were used in the research to secure a comprehensive understanding of the publishing of children's books in the Arab World. According to Silverman, multiple methods are used to answer several research questions and to reach a form of methodological triangulation (2005, p. 121). Each method used had its advantages and drawbacks. Employing questionnaires and interviews provided the mechanisms to access differing marketing results, rarely studied in the Arab World. In the investigation, a number of weaknesses in the Arab World's approach to marketing were identified. The primary vulnerability resulted from the fact that almost all the publishing houses, government ministries, book shops, NGOs and book fairs did not generate their own statistics or collate their own data. As a result, assumptions and estimates were given by the respondents to answer some questions while other questions were left unanswered and are unverifiable. The organizations studied were hesitant about divulging their sales figures, thus failing to respond to the questionnaires or queries candidly. One of the key goals of this study was to make an original contribution to the discipline of publishing by advancing the understanding of how marketing works in different cultural environments. Applying some successful British marketing techniques to the Lebanese market worked best, since the results were directly tested and controlled using Asala Publishing as the testing ground. Book purchasing habits and book marketing are totally different in the UK and the Arab World, and this research begins to assess these differences and address the need to re-think the Arab World's marketing of children's books. Qualitative and quantitative research methods were employed to best determine the reasons why children's book marketing in the Arab World is still developing, and to try to come up with successful marketing methods to be applied there.

Publishing in Lebanon: An Overview
With a Special Focus on Children's Books

Introduction

This chapter discusses the importance of Lebanon as a publishing capital of the Arab World, the current environment, and the main factors affecting children's book publishing in Lebanon. The Consultation and Research Institute (CRI), Books and Reading Committee (BRC), Najla Bashour (researcher and publisher), and Maud Stephan Hashem (researcher) stress Lebanon's role as a significant Arabic-language publishing centre despite the current situation and the obstacles facing the industry. Although this study is primarily concerned with Lebanese children's book publishing, it is important to situate Lebanon in context in the Arab World. The far greater markets in other Arab countries have great influence on the Lebanese publishing industry in production, marketing and sales. This chapter will consider the situation in Lebanon and the other Arab states which make up the main market for Lebanese publications.

Publishing is shaped by factors inside a publishing house itself, such as structure, vision, and management, as well as external factors like the current political situation, laws and regulations in countries, and the market. Finally, the book chain including authors and illustrators, bookshops, and distributors play important roles, too.

Publishing can also be affected by history itself where experience can be an important factor. Hashem traces the development of publishing in Lebanon to the eighteenth century, when the first printing houses were established, followed by the university presses in the nineteenth century (American 1834 and Saint Joseph 1853) (2010, p. 88). The publishing business in Lebanon is one of the oldest in the Arab World and it has been developing ever since.

Compared to its population and that of other Arab countries, Lebanon has a substantial number of publishing houses and published titles. The CRI states that there are 162 active publishers in Lebanon (2010, p. 9). The Lebanese publishers produced between 3,000 and 4,000 titles annually in the four years prior to 2010 (CRI, 2010, p. 44). The Lebanese Publishers Union presents statistics for 2004 when 7,500 books were published, including 2,700 new titles while others (whom Hashem traces to the Abu Dhabi Book Fair website) assert that 3,686 titles were published between 2004 and 2005 (Hashem, 2010, p. 120). The discrepancy in numbers might be due to the fact that there are no official statistics in the

country that can be counted on (discussed in the Introduction and Literature Review). These figures are substantial when compared to a population of only five million living in Lebanon. In their 2009 study, the BRC draws our attention to the fact that Lebanese houses only sell 10% of their books in Lebanon, while the rest are sold in other Arab countries and in other parts of the world (2009, p. 18).

Favourable legislation and freedom of expression laws offer the Lebanese industry liberties unknown in other Arab states. Liberal publishing laws have greatly advanced the development of Lebanese publishing (CRI, 2010, p. 1). According to Hashem, Lebanon is the leading country in the region regarding the publishing industry's influence on the economy (2010, p. 21). Books make up 0.843% of the total national product, while 0.79% of people in Lebanon work in the industry, and 3.36% of total exports are books (Hashem, 2010, p. 22). CRI stresses that the book industry developed as a direct result of publishers' activities (2010, p. 42). The author's union counts around 650 members (BRC, 2009, p. 8). The plethora of authors available in Lebanon is harnessed by publishers to produce bolder titles and publications (innovative titles, less traditional topics, fresher illustrations, and better production values).

Authors are easily able to visit publishers who are mostly situated in the city (Beirut). The CRI pointed out that 97% of publishing houses are situated in Beirut even though publishers come from different parts of the country (2010, p. 2). Beirut is a small city thus having most of the publishers in the same area puts publishers in a situation where they can be affected by similar factors like the lack of stability. In addition, Lebanese printing houses are known for the high quality of printing, which helps the publishers develop their work and makes the market competitive. The children's book sub-sector benefits from these industry-wide factors, and is known for the quality and variety of books produced (Bashour, 2012, pp. 24-30).

In their analysis of titles published between 2000 and 2008, the CRI identifies that 14% of overall publications in Lebanon are children's books. They are the third most popular genre, trailing only religious books and academic/school texts, which make up roughly 19% and 15% of sales, respectively (p. 74). This highlights the importance of children's books in the market and the growing demand. Hashem observes that over the past five years an array of children's publishing houses have emerged in Lebanon (2010, p. 121). CRI adds that the newer innovative methods of publishing houses make Lebanese children's books especially competitive internationally, as seen in the numerous awards given to Lebanese titles (2010, p. 121). While Bashour stresses that after 1990 new kinds

of children's literature were introduced in the Arab World, this publishing phase is broadly characterized by the fact that children started to read for pleasure and not solely for school work (2012, pp. 24-30). As a result, illustrations are more prevalent in these books, rendering the pictures and the printing of increasingly high quality (Bashour, 2012, pp. 24-30). With the development in publishing children's book in the Arab World in general and Lebanon in particular come the questions and considerations of the factors affecting publishing.

Key Issues in Publishing in the Arabic-Speaking World

A number of factors affect publishing in the Arab World. These in turn are increasingly affecting Lebanese children's book publishing. This section will discuss the key issues starting with the publishing houses themselves and expanding to external issues including socio-economical and historical factors.

The Prevalence of Family Businesses

Publishing in Lebanon is predominantly a family business. In my experience as a publisher, more than 70% of the children's book houses in Lebanon are family-run businesses. Hashem observes that this is true in Egypt, as well, with ownership in many firms resting with the third-generation, building on the methods established by their grandparents (2010, p. 90). As a result, many departments such as editorial and rights rarely exist in Lebanese houses, with owner-publishers relying on their own expertise as well as informal contacts and friendships in business. These ongoing longstanding relationships shape and influence the titles chosen to publish, and the marketing campaigns that a publishing house might adopt. Hashem describes publishing houses in Lebanon as mostly small in size, family-owned and managed, with decisions made by individuals or using the sole decision-maker model (2010, p. 120).

Some family publishing businesses in Lebanon maintain their inherited size and scale, basing decisions regarding the number of employees, print runs and titles on tradition, while others decide to focus or expand, including more sections and specializations. My experience as a participant observer in the role of a publisher and competitor in this market suggests that this is based on the nature of the new generation and its relationship to the past. In some situations, a greater number of partners can affect the functions given, either

enhancing the publishing house but certainly adding more overheads. In other situations, the relationship with customers and the experience of the father/owner is not known by the second generation, which affects the sales. When the younger generation takes charge, in a few cases, they try to develop the business by modernizing it and applying some new techniques. In addition, with the third generation in many times more overheads are added but in most of the times relying on the traditional ways of conducting the publishing business.

A Range of Different Publishers

The CRI observes that publishing houses in Lebanon, as in many other areas in the world, vary in terms of number of workers, the number of titles published and the importance of capital (2010, pp. 65-80). Publishing in the UK - and more broadly - is changing, as mergers are increasingly common for the smaller publishing houses. Large companies are taking over smaller publishers in order to be able to function on a larger scale and access a greater market share, like Hachette-Lagardere where they have been buying smaller publishing houses for the past couple of years. In 2007, for instance, the big publishers in the world covered 25% of the books presented in book fair space (CRI, 2010, p. 94).

Conversely, in Lebanon smaller publishing houses are opening, targeting niche markets. Mergers are difficult where family firms predominate, particularly in Lebanon where business owners stem from the legacy of the merchant class, and family-run businesses are far more prevalent than partnerships. Employees in publishing houses gain expertise from working with established publishing houses in order to later establish their own.

Authors too often start their own publishing houses in order to retain control over their own work.. Hashem points out that authors in the Arab World are opening their own houses mainly due to trust issues with publishers (2010, p. 55). Other authors are driven to self-publishing after existing publishing houses reject their manuscripts. Some examples of children's book publishing houses opened by authors over the past fifteen years in Lebanon are Dar Onboz, Al-Khayat Al-Saghir, and Annawwar.

Publishers often prefer to do many things themselves (like dealing with bookshops, customers in book fairs, and authors), relying on their personal relationships and limiting the access to information for their employees and authors. Some smaller publishing houses (Yuki Press, Turning Point, and Tala Establishment) tend to have less capital and collateral for marketing and public relations, and as a result tend to focus on niche markets, or

prestige publishing. According to Hashem, Arabic book publishing is not as advanced nor are the publishing houses as adept at implementing change, which means that smaller, bespoke or boutique publishing houses can better fill the gaps in the most lucrative sub-fields of publishing (2010, p. 90). For instance, in Chapter Two Yuki Press, a small publisher highlights its successful experience in publishing of a cookery book for children and marketing it in bakeries.

The Variety of Business Models

In contrast to the newer niche publishing houses, many of the major Lebanese publishers have diverse publishing lines, often producing academic and educational, children's books, and adult fiction. CRI points out that Lebanese publishers publish different lines of books to satisfy the different market segments since publishers think that diversifying production is "beneficial and increases sales in the short term" (2010, p. 74).

Multiple lines established under one publishing umbrella are often the result of adaptation to precise market trends and needs rather than the publishing house's long term strategic vision. Many publishers respond to the success stories of their competitors, be they Lebanese, Arab, or international. This is one of the reasons why most of the 'big' publishing houses in Lebanon have children's book lists in their catalogues. Another reason is that publishing and marketing in the Arab World are based on personal relationships and social capital. For example, bookshops and distributors in the Arab World often place greater book orders once a strong relationship is established. Social capital plays an even greater role in Arab publishing than elsewhere. As a result, publishers are keen to maintain relationships with distributors and diversify their products in order to satisfy distributors' needs. This influences the way the publishing houses are structured and run. The position of editor, for example, rarely exists in Lebanese publishing houses, with the selection of titles mainly fulfilled by the publisher/owner. In the UK and US, the role of a literary agent is vital in the book publishing chain, whereas in Lebanon authors send their books to publishers who evaluate the books themselves (details about the publishers' lists, size, specialties, and editors' position will be discussed in Chapter Two).

Translation

Owen (2004, p. 1) states that "generations of children have derived a wealth of pleasure from reading translated literature" including the Brothers Grimm's stories, *Pippi*

Longstocking, and *Mummins*. However, the direction and flow of international children's literature can be quite uneven. According to Owen, approximately 1% of the children's books sold in the UK are translations, compared to 40% in Germany and Holland (2004, p. 1). The phenomenon is especially important in Lebanon. In my 2,000 MA thesis, I analysed the 3,363 titles published by most of the Lebanese publishers till that date, of which 1,517 books were translated and 1846 were originally in Arabic, making translations around 45% of the total number of books produced in Lebanon.

Translation of foreign titles is undertaken for many reasons in publishing. As Owen says, "reading translated literature can foster an international outlook in children, and any increase in the number of truly outstanding world-class works of literature available to young people must be applauded" (2004, p. 1). Some titles are translated because of their high quality and publishers wish to include them in their lists. For instance, award-winning books and globally-famous authors are usually very popular and publishers compete to translate their titles. The number of languages translated into adds a quality or importance to a title; this is used as a marketing and promotion technique by publishers.

There are two barriers to translating children's books: the additional costs of translation and buying rights, and "finding and employing readers and translators" (Owen, 2004, p. 1). Translators are sometimes given royalties in the UK, while the situation is different in the Arab World. Translators in Lebanon are given a one-time payment that is usually not very high. Lebanese publishers are frequently bilingual, facilitating the evaluation of titles from French or English. Many international publishers offer Lebanese firms good deals on translation, making companion CD's, or subsidizing illustration costs and royalties since translation into Arabic via a Lebanese publisher is almost a guarantee of export into the rest of the Arab World.

In recent years, Lebanese publishers have taken advantage of a series of opportunities to be funded for translations. Cultural centres and institutions often provide subsidies for translation; chief among them are the French Embassy in Beirut, the German Goethe Institute, Emirati Kitab, Finnish FILI, and Norwegian NORLA. Subsidies play a role in increasing the number of titles translated in Lebanon, since both parties benefit from such a situation where the local firm decreases its costs and the international publisher gains readers in other countries. Another reason behind subsidizing translations into Arabic is to build the habit of translating from the language, especially in an English-dominated field.

Some Lebanese publishers find translation an easier way to acquire high quality books, since some claim that it is difficult to find professional Arab authors and illustrators. For

instance, Dar Al-Ilm Lilmalayin has a sizable list of translations, and according to their questionnaire answers, their reading series are 100% translated (see Chapter Two).

Although translated works widen one's horizons and introduce new ideas, especially to readers with no knowledge of other languages, translation can have its drawbacks. In books intended for very young children (up to three in Piaget's sensorimotor stage, discussed in the Methodology), the selection of texts should be carefully considered, since children at this age should be presented with books that connect with their immediate environment. For instance, an Arab child will have difficulty in relating to a book with a main daily activity of five o'clock tea and scones.

Excessive reliance on translation is not healthy, either, since it presents patterns of behaviour and environment that the child does not experience. One of the main goals of books, even for children less than three years old, is to identify with the characters and learn how to solve their own problems and learn about their traditions. Having more translated books than original books could not fulfil this purpose. In the last five to seven years, many school teachers and customers visiting our book fair stands in the Arab World have expressed interest in purchasing authentic Arabic books, thus driving publishers to look for Arab authors and illustrators.

Authors and Illustrators

Authors and illustrators are main players in the children's publishing industry, but the CRI (2010) states that there is no research available on authors in Lebanon. Authors rarely survive from writing alone, and authors tend to supplement their writing income with a second career or profession (p. 36). Hashem observes that the perception of writing as a pastime rather than a profession compounds the problem of professionalizing writing (2010, p. 52).

Based on our experience in Asala Publishers, many children's book authors are teachers and often librarians. Teachers are closer both to the needs of children and the demands of the children's book market. In addition, illustrators are abundant in Lebanon, though many cannot rely on children's book illustrations alone, and are often freelance designers where there is a high demand and better returns. As a result, illustrating for children's books provides an opportunity to be more creative and work on new and different techniques.

Hashem observes that many publishers in the Arab World reprint books, creating new editions without informing the author and without paying copyright fees and royalties. Indeed, without clear data on book sales and widespread piracy across all sectors, the relationship between the publisher and the author in the Arab World is distorted as a result. As a result of these regional peculiarities, many authors prefer to get a one-time payment and concede or give up their rights rather than wait for a percentage royalty on sales income (2010, p. 55). However, Hashem draws our attention to the changes afoot in Arab publishing, especially the trend of successful authors preferring to pay for their own publishing and establishing their own publishing houses (2010, p. 55).

The question of trust and differences in social capital is reiterated concerning the position of authors. CRI defines the relationship between some authors and publishers as one of mistrust (2010, p. 40). The author is the “easiest and weakest victim” and is unaware of how best to defend his rights and is less likely to engage in conflict with publishers, particularly when there are no clear and transparent statistics on sales (Hashem, 2010, p. 56).

The Book Chain

Those involved with the publishing industry operate within chains both of relationships and products. CRI in 2010 draws our attention to the relationship between the different links in the book industry: authors, publishers, distributors, and store owners. Based on semi-structured interviews with representatives from different specialties in Lebanon, the CRI (2010, p. 29) suggests that the relationships are characterized by non-cooperation, a lack of coordination and a “state of secrecy and corruption”. This is attributed to the “lack of respect for rules and ethics”, where different links in the chain fail to present transparent accounts of their situation to the other members (p. 29). The view is supported by Hashem, who points out that publishers not only distribute but also compete with the booksellers by selling their books directly to customers through schools, book fairs, and their own bookshops (2010, p. 123).

There are no defined specializations or roles in the publishing industry in Lebanon. In this market, a publisher can be an author himself and the author can open her own publishing house. Bookshops can simultaneously be publishers and print their own series of books or, conversely, can be owned by publishers. Publishers can sell directly to the customers and readers who visit their offices, removing the middle man and saving the bookshop mark up

on prices. All these factors have a significant influence on the relationship between the different actors in the supply chain. For example, Dar Alilm Lilmalayin, Librarie Oriental, Librarie du Liban, and Samir (all children's book publishers) have their own bookshops. Antoine, the biggest bookshop chain in Lebanon, started its own publishing house publishing children's books and other titles in the past ten years. These actors in the book chain have their own association unions. Unions can play an important role in the industry, since they have the ability to bring different members of the same specialty together under a professional umbrella, and if effective, can help to develop the industry.

Trade Unions

One of the factors influencing the book industry is the weak network of trade association unions in Lebanon (CRI, 2010, p. 30). The effectiveness of the Syndicate of Publishers' Union in Lebanon, established in 1947, is hampered by multiple barriers. "There are around 700 publishers in Lebanon", however the active members do not exceed 200 (The Syndicate of Publishers' Union in Lebanon, 2014). Active publishers are those who publish books every year and take part in book fairs. In their 2010 study, the CRI identifies 790 publishers, of which 651 are Syndicate members. A number of those firms are part of other publishing houses. CRI asserts that 162 publishing houses are active, taking part in at least one book fair (p. 9). Hashem suggests that in fact there are only around 150 active publishers in Lebanon (2010, p. 120). According to Hashem, freedom of expression, printing development, and favourable legislation contribute to attracting publishers from other Arab countries to operate in Lebanon, which adds to the overall number (2010, p. 120).

It is notable that there is much debate over elected positions in the Union, particularly since the Union uses the same quota-based proportional representation system as the Lebanese power-sharing system, with voting based on religious affiliation and sect membership. For example, the positions of board members are allocated between Muslim-Sunni, Muslim-Shiite, and Christian-Maronite. The Union's role is limited to circulating book fair information and representing its members at some international book fairs. The Syndicate of Publishers' Union in Lebanon could act as a better union if stricter rules were applied to ranks to discourage passive membership. This would promote the publishing business' development by selecting active knowledgeable board members, encouraging better international representation, funding studies, and resolving conflicts.

The Lebanese Children's Book Publishers' Association (LCBPA) was established in 2007, and counts a good number of the country's children's houses as members. However, the association became ineffective soon after its foundation due to many reasons, including conflicts between members, and minimal support towards budgetary needs. With no governmental or other financial support the role that LCBPA played stayed small in comparison with Arab Children's Book Publishers Forum (ACBPF).

Shortly after the LCBPA's establishment, the ACBPF was created in March 2008, under the umbrella of Sharjah and the Arab Book Publishers Union. This group represented children's publishers in several countries and received support from its Emirati patron, representing the Arab houses in international book fairs. It soon proved to be more active than LCBPA.

These groups demonstrate the difficulties that Lebanese unions face in maintaining a long-term presence. If roughly 200 publishers are not able to agree and work together in common cause, what chance do other groups in the country, including teachers and school management, have in promoting the Arabic language and reading?

Teaching the Arabic Language and Bilingual Concerns

Bashour observes that the Arabic language has been neglected for centuries and is being presented in schools in a very "classical" and traditional manner. As a result, Arabic is losing its appeal among the next generation of Arab children, many of whom are bombarded with English language sources and taught English in a manner that renders the latter more appealing than the former. Arabic educators and organizations are mobilizing to address the language issue and develop it in a way that can appeal to children (Bashour, 2013, p. 7). Publishing in the region has neglected the issues associated with Arabic language. Researchers and educators in the Arab World are equally neglectful, and have yet to provide a comprehensive assessment of how proficiency in the Arabic language is acquired and how it is learned when compared to other languages. As a result, there are very few studies in this domain (Bashour, 2013, p. 22). What we know from the limited existing data and publishing practitioners' experience originates in Lebanon.

When comparing Arabic to French and English, Bashour asserts that the Arabic language is perceived negatively and approached differently, particularly in the formative years of study. This attitude permeates the political classes, and is commonly held among educators and citizens. In research done on early teaching in Lebanon, 43% of parents prefer to teach

their children a foreign language in schools first, while 39% would like both languages taught simultaneously, and 13% prefer to begin in Arabic. As for teachers, 48% prefer that both languages should be taught together, 23% with Arabic language first, and 16% prefer that foreign languages be taught first (Bashour, 2013, pp. 23-24). Research supports the fact that Lebanese parents view the acquisition of a second language as highly important. As a result, Arabic children's books are suffering from competition from foreign language books used to teach and acquire the second language and from an early age.

The legacy of France's historic involvement in Lebanon dictates that three significant languages are constantly in use there. Multi-lingualism influences the publishing sector, since most students are officially bilingual once they start school. In private schools, science and mathematics are taught in either French or English, and many children are more inclined to read in either French or English rather than in Arabic. This, in turn, impacts the sales of Arabic children's books. In Beirut's established bookshops, displays are organized around the English and French books while Arabic children's books are relegated to a smaller and less prominent position.

Arabic language educators and teachers acknowledge the need to promote reading in all three languages, and many Lebanese schools have summer and winter reading lists for children to complete during school holidays or vacation times. Informal language policies derived from the educators' determination to encourage reading (in Arabic and the other languages) and language acquisition among children has a positive impact on the publishing sector in Lebanon. However, some positive long terms plans involving reading promotion and the Arabic language are affected by instability, especially in the case of war.

War

The legacy of protracted civil war and conflict in Lebanon has impacted the children's book industry seriously. As conflict theorists note, political instability and civil war have a negative impact on risk assessments at the state and the domestic level. Civil war in particular harms both foreign direct investment and local business, and ultimately contributes to lower standards of living for the duration of the conflict and in the long period toward peace in most conflict-to-peace transitions.

Harvie and Saleh's overview of the 1975-1990 Lebanese Civil War emphasizes the high public debts resulting from loss of revenues and attempts to maintain basic public

expenditure. The following period from 1990-2006 was characterized by rebuilding, which had positive effects on the economy “but its legacy is a huge public debt and a servicing requirement that currently absorbs alone almost 30% of total government revenue and is the highest in the world on a per capita basis” (2008, p. 857). The thirty-four days war with neighbouring Israelis during July–August 2006 stalled any conflict-to-peace transition and set the situation backwards again, with estimated direct and indirect costs reaching US \$15 billion. The conflict was all the more troubling because Lebanon’s gross domestic product (GDP) was growing and had reached 6% immediately prior to the crisis. Harvie and Saleh observe that the 2006 conflict resulted in “the devastation of residential property, vital infrastructure, loss of agricultural production, industrial production, exports, environmental damage, the collapse of tourism and a further erosion of the influence and power of the central government” (2008, p. 857). The impact of protracted conflict in a long and drawn-out civil war and a post-conflict transition hindered by renewed conflicts takes its toll on the Lebanese-domestic economy. Instability impacts investment and repeated iterations of instability compound fears and curb investment.

Instability continued into the post-war period, with the years since 2007 characterized by a number of high profile assassinations of political leaders and journalists. Assassinations reiterate the fear and threat perception associated with the insecurity of civil war and conflict and perpetuate the concerns that in turn persist in damaging the Lebanese economy.

The ongoing civil war in neighbouring Syria has influenced Lebanon in a number of ways since its inception in 2011. As Asfour argues,

concerns were overshadowed by fears that national unity and sovereignty were cracking under pressure. This small country is not only feeling the strain of the influx of Syrian refugees -- the fastest growing refugee population in the world, soon to be the largest. It is also being dragged into regional and sectarian tensions that are increasingly played out on its soil, as testified by the twin explosions carried out by al-Qaeda-affiliated suicide bombers against the Iranian embassy in Beirut three days before Independence Day. (Asfour, 2013, p. 1)

The impact of events had repercussions for the publishing industry in Lebanon. According to the 2010 CRI study, most of the Lebanese publishing houses established after 1970 were affected the conflict, although the war did not completely hinder the industry’s development (p. 2). Many publishers developed their businesses during the war, but would almost certainly have made greater strides in a more stable environment, particularly

regarding trade and export potential. Growth stagnated and with it the capacity of publishing houses to advance and expand their existing businesses. On the contrary, the war rendered it all but impossible to sustain existing business. The individual costs of the war on family-run publishing houses were immeasurable.

The war affected publishing in Lebanon to a far greater extent than existing empirical data of the period suggests. While the publishing industry is highly developed compared to any of the neighbouring states, the legacy of the civil war has left the Lebanese economy in debt and institutionalized a perception of instability, impacting the Lebanese state economy irrevocably.

The Economy

An economy can be defined as an “entire network of producers, distributors, and consumers of goods and services in a local, regional, or national community” (*Economy*, 2014). The network is greatly affected by the country’s political situation and stability, where in case of war producers, distributors, consumers, and services can be greatly restricted. The Lebanese economy is a protracted war economy, unusually dependent on Diaspora remittances from abroad. In traditional economic terms, Lebanon’s economy is primarily driven by the tourism sector. However, as previously outlined, this sector has been harmed by decades of instability, domestic civil war, and regional insecurities. Most recently, the influx of Syrian refugees since 2011 has hindered opportunities for foreign direct investment and undermined Lebanese incomes. The regional changes and transitions heralded by the “Arab Spring” threaten exports and deter direct foreign investment. Regional markets are limited and domestic capacity to expand is curtailed by diminishing demand and increasing prices. The publishing sector is struggling with decreasing demand, increasing costs, taxes, import and export duties and limited scope for expansion.

It has been noted that the “current state of the book industry in most of the Arab World is characterized by complexities and challenges. In economic terms, markets such as Egypt, Lebanon, the Gulf States, and Saudi Arabia have little in common aside from the Arabic language” (Wischenbart and Jarrous, 2012, p. 8). Wischenbart and Jarrous (p. 8) point out that the “huge differences in the per capita GDP between Gulf countries and countries such as Egypt,” are reflected in book-selling where titles published in Lebanon are priced about 20% higher than the titles published in Syria and Egypt. Wischenbart and Jarrous add that

print runs are low, “between 1,000 and 3,000 copies, reflecting the patterns and benchmarks of small markets and not the impressively high number of readers who share the Arabic language” (2012, p. 9). Economic problems affect the budgets provided to the different ministries in the Lebanese Government, including the Ministry of Culture.

The Ministry Of Culture

The Lebanese Ministry of Culture (MoC) is one of the official governmental entities in Lebanon that work on promoting reading and books. The MoC is known in Lebanon to play a minimal role in promoting and developing the book business. This is due to several reasons, including the change of policies that come with every minister, the country’s unstable economic and political situation, the small budget allocated for the whole ministry and specifically for the book sector, the limited resources for employees working on promoting books, and the variable international support that the ministry gets. Imad Hashem, the head of the MoC’s book and reading department, answered my interview questions very briefly. Imad Hashem (2014) points out that the MoC was created in the nineties and in 2003 by the Book and Reading Department was formed. The Lebanese MoC has forty employees distributed in several departments, including Cinema and Theatre, Fairs, UNESCO Palace, ISBN, Antiquities, and Conservatoire, while the Book and Reading Department in the Ministry has two employees. The Lebanese MoC has the smallest allocated budget in the government, reaching around eleven billion Lebanese Lira a year (around US \$7.3 million), a very small part of which is allocated for books. According to Imad Hashem, the ministry works with several NGOs but in an inconsistent way. The French government’s support for children’s books between 2006 and 2009, and the Beirut World Book Capital in 2010 were the main two activities that have happened in the last ten years. Imad Hashem stresses that the support the ministry gives for children’s book publishing is related to the availability of financial budgets and supports; as a result there is no clear and specified policy. There is no direct support from the MoC for Lebanese children’s book publishers in international book fairs, like Frankfurt Book Fair, Bologna Book Fair, and London Book Fair. However, the ministry constantly coordinates with the publishers about the possibility of taking part in international book fairs through renting a small collective stand for Lebanese publishers. According to Imad Hashem, successful events supported by the ministry included the FSP (French government supported projects). The FSP aimed at developing the children’s book publishing industry through several projects including sponsoring the publication of children’s book series,

purchasing Lebanese children's books, supporting the publication of local Lebanese children's books, and organizing a movable book fair with events to meet authors and illustrators in several areas of the country. Imad Hashem ended by saying that there are no future plans, since much depends on the availability of financial support.

It is evident from Imad Hashem's responses that the Lebanese MoC is highly affected by the economic situation, and that reading and books are given minimal support especially when the country faces major problems. Other ministries like Health and Education get much higher budgets and support in comparison. The change of policies and programmes are also highly affected by the frequent change of ministers themselves, who come with different agendas and backgrounds. The country's current situation does not show much hope for change in this regard, especially given the upheaval in the whole region. As a result, the Lebanese MoC's role might stay minimal for the coming years.

NGOs

There are several NGOs working on promoting books and reading in Lebanon, including three main ones focused on promoting reading and children's books. They are: LBBY (Lebanese Board of Books for Young People), Assabil, and Ana Aqra. Bashour stresses that children's books can fulfil many psychological needs, including: security, connecting with the heroes in the books, knowledge, beauty, and order. In addition, Bashour notes the two important components in literature, challenge and excitement through learning and knowledge (2012, p. 8). NGOs in Lebanon have recognised the importance of reading and literature, and are working on many activities to promote reading, especially among children.

In the following part I will discuss the work of the NGOs and their opinions regarding reading and books, based on interviews carried out with those organisations.

NGOs – Table 1

NGO	LBBY	Assabil	Ana Aqra
Members	45 members; 7 board members	35 members; 7 board members	11 board members
Activities	Mobile libraries; reading competitions; workshops and training sessions	Manage public libraries and portable libraries; host cultural and educational events	Activate classroom libraries- teach reading
Stories of success	All our activities	All our activities	Initiated 35 schools activated reading hour
Support	Donors- members; events	National and international sponsors	UNICEF; UNESCO; EU; Al Madad Foundation; AL Fanar Foundation; private donors

LBBY is affiliated with an international organization, IBBY (International Board of Books for Young People), and promotes reading through competitions and workshops, Assabil was the first to start public libraries in Lebanon, and Ana Aqra supports classroom libraries and helps children master reading. It is apparent from the table above that all three NGOs are relatively medium-sized. The three NGOs did not mention receiving any support from the Lebanese government, but rely on international and national donors to support their activities, and the three NGOs were established since there was a recognised need to promote reading and books in Lebanon. The activities reflect the important role that NGOs in Lebanon play to fill the gaps and work on the needs that have been raised by the Lebanese wars.

During the interviews, the members of the NGOs had different opinions on how Lebanese publishers can develop their work. According to LBBY founder Dr. Julinda Abu Annasr (2015), Lebanese children's book publishing can be developed through professional development, especially in the domains of children's literature, business development, and marketing. Abu Annasr stresses the importance of developing marketing skills and being innovative in the way publishers reach customers.

According to Ali Assabagh (2015), representing Assabil

the Lebanese children's book publishing has developed greatly in recent years and publishers should work to ensure that the sector continues to develop. [The Lebanese children's book publishers] should work to ensure the quality of the texts they publish and support innovative, well-written books and tackle old and new topics in creative ways, including topics that might be considered taboo, such as

religion, sex, love, death, jealousy and negative emotions. Publishers should continue to discover new illustrators and constantly improve the production of the book (without greatly increasing the price).

Amina Klet (2015), from Ana Aqra, believes that Lebanese publishers should:

[t]hink of the child first. Think of reading as a serious skill that if the child cannot build from early years will lose it forever. Believe that children are thinkers and their taste is extremely important and they will only read and like to read about... Get to know the Lebanese children and what they like to read about... write for the child.

It is apparent from the responses that there is a great need to develop children's book publishing in Lebanon, especially in terms of content and marketing. Due to the high demand for promoting reading and books, the three NGOs are still working on promoting reading, but hope that publishers can further develop children's books publishing. NGOs can be far from the business nature of Arabic children's book publishing and the need for research is necessary to help NGOs to have a better view and understanding of the children's book publishing business and market.

Bookshops in Lebanon

While Beirut and its suburbs have up to 100 bookshops, only a few are professional in displaying books properly and being updated with new titles. The other major cities in Lebanon have a limited number of small bookshops, and it is harder for smaller bookshops to get books (Hashem, 2010, p. 123). Most of the shops in Beirut who call themselves bookshops mainly sell stationery, newspapers, and sometimes toys, reflecting the weak role that the bookshop plays in the book business in Lebanon. This is due to many factors.

First, many organisations do not respect the role of bookshop and buy directly from publishers. Hashem stresses that public libraries buy their books directly from publishers, benefiting from high discounts, skipping the bookshop as a bridge and an important element between the book producers and the customer, while publishers also sell books directly to customers, excluding bookshops (Hashem, 2010, pp. 8-9). Ignoring the role of the bookshop affects the development of public reading, which is the most important element in the continuity of the publishing industry (Hashem, 2010, pp. 8-9).

Second, the relationship between bookshops and publishers is not strong enough and innovative marketing is rarely applied and is not well developed. According to Hashem,

marketing requires a link between bookshops and publishers' representatives who go around in different areas getting bookshops familiar with products and collecting orders. Hashem adds that this process can be hard on small publishers with a limited number of titles who cannot afford the high costs of representatives, while in the West, for example, big distributors are dominant in the international market, often owned by publishers, and push their titles (Hashem, 2010, pp. 108-109).

Third, the habit of buying books is not well developed and few customers go to bookshops to buy books to read themselves or for their children. This can be due to the few available bookshops, the relatively small spaces given for children's books, the display of children's books which is usually not very attractive and welcoming, and the few offers and marketing done by bookshops to attract customers.

Fourth, there are outlets for book purchases other than bookshops. International book fairs and school book fairs are especially important in Lebanon, and attract customers to buy books at discounted prices, far less than the prices they find in bookshops.

In the following section I will discuss the results from interviews carried out with five bookshop owners/managers in Lebanon. The selection of bookshops was based on the range of types of bookshops and the shop's willingness to answer my questions. The interviews seek to find the basic information about the bookshops and have a deeper understanding of how bookshops operate and the relationship the bookshops have with publishers.

Bookshops – Table 2

Bookshops	Nadim	Mneimneh	Antoine	Bookland	Alburj
Location	Zarif – west Beirut	Mar Ilias – west Beirut	ABC (Mall) – east Beirut	Mazraa – west Beirut	Downtown Beirut - Central
Area (msq)	60	60	100	300	210
Number of Staff	2	1 (owner)	8	3	6
Part of a Chain	No	Yes (2 nd store for family)	Yes	No	No
Source of Purchase of Books	Publishers	Mostly publishers- Distributors for school-books	Publishers	90% publishers 10% distributors	90% publishers
Space for Children's Books	20%	20 msq	30%	60%	20% = 40 msq
Space for Arabic Children's Books	15% Arabic 5% English	10 msq	Depends on location of bookshop and demand; for example in Souks Beirut DT all single floor for Arabic Books (out of two floors)	50% of children's books area	13 msq
Activities in Bookshop	None	None	New titles- return books; no space for activities	Reading week activities; inviting schools for storytelling	Books signing events; launching; storytelling (few people attending)
Best-selling Books	None	None	Politics and Ahlam Mostaghanmi (novels)	Books based on movies; books affected by word of mouth	Books about Lebanon
Best-selling Children's Books	None	None	No one title	Diary of Wimpy Kid	Picture books
Best-selling Lebanese Children's Books	Mixed	None	Educational books	No one title	Picture books

Bookshops	Nadim	Mneimneh	Antoine	Bookland	Alburj
What affects sales of Children's Books?	Parents want their children to read	School lists	Looks [cover and quality]-reasonable price	Word of mouth; TV; colours of book- size	The booksellers' advice
What publishers do to promote their books?	Send new titles	Nothing	Window- books on tables	Nothing	Very few send new titles- couple of activities rarely; foreign publishers come and present new titles
Customers	Parents	Students (school lists)	All	All	Parents; public libraries; cultural organizations
Who chooses books to be put in the bookshop's window? Why?	Window is not used	Cookery (since they are best selling); no criteria behind choosing	Team in each bookshop	Team sometimes decorate according to occasions	Team based on identity of book
Number of Lebanese Children's Book Publishers	6	10	45-50	Around 15	Around 20 some publishers only 1-2 titles
Best-selling Lebanese Children Book Publishers	Asala and Librarie Oriental	Asala	Asala	Dar Al-ilm Lilmalayin (the publisher owning the bookshop); Asala; Academia; Al Maaref	Asala; Onboz
How can Lebanese publishers develop their work	Send book-display-stands	Return and exchange books	None	New ideas for promotion and marketing	Visit to explain new titles; backup old titles to support new books and book launching events

The five shops varied in size, ranging from a small neighbourhood bookshop selling school-books (Mneimneh), a small neighbourhood bookshop selling general books for readers (Nadim), a bigger bookshop owned by a publisher (Bookland), the biggest chain

bookshop in Lebanon with bookshops in malls (Antoine), and a downtown Beirut shop selling to individuals and institutions (AL-Burj). The results highlight the fact that bookshops occupy a small space in Lebanon, selling stationery, other genres of books, and foreign books in addition to Arabic children's books. Activities are limited to a few book-launch events or bookselling events in two of the bookshops, while there is no best-selling Arabic children's book title but different titles do well. School lists, the book look (format, cover, and quality of production), word-of-mouth, TV and the booksellers' advice are the factors mentioned that help in increasing sales, while all the bookshops agreed that books placed in bookshop windows do not increase sales of the title. The number of publishers that bookshops deal with varies between six and fifty depending on the shop. All bookshop managers stressed that publishers provide minimal support and marketing activities for bookshops. Publishers need to update bookshops with their new titles, be flexible with return, and back-up new titles in order to support their relationship with the bookshops. The results reflect the fact that most publishers do not acknowledge the role of bookshops in Lebanon and it is reflected in the relationship between bookshops and publishers and the minimal visits and marketing support plans.

Antoine was the only bookshop interviewed which had started to charge publishers if they needed to place their books in the windows. This is mainly due to the fact that many publishers always think of highlighting titles in the bookshop window and the chain bookshop purchasing manager decided to charge the publishers. The head of the Arabic purchasing department, with thirty-four years of experience, assured us that the result of sales due to placing books in the windows are not encouraging, since the sales increase is minimal. It is worth noting that the prices the bookshop charges for placing a book and a banner in a bookshop window is about US \$200.

Al-Burj Bookshop owner Michele Shweiri (2015) stresses that the relationship between publishers and bookshops is not positive, the quality of return is bad, and minimal effort is put in from publishers to build a relationship with booksellers. Shweiri believes that distribution can solve many problems, since the cost for a publisher to deliver a couple of titles to a bookshop is high in comparison to that required by a distributor sending many titles from more than one publisher to the individual bookshops.

The Data Deficit in the Publishing Sector in Lebanon

Dissemination of information in Lebanon's publishing industry lags behind that of the West, leading to a pronounced data deficit (discussed in the previous chapters). Evidence suggests that around a quarter of Lebanese book publishers do not use ISBNs in their publications, despite the MoC's request that they do so for their latest titles (CRI, 2010, p. 2). Moreover, it is rare to find studies and statistics on the status of books and publishing in Lebanon. This can be attributed to the limited support provided by the government and the general climate of secrecy (where publishers do not share information). The BRC stresses the importance of conducting detailed studies of every sector of production and distribution in Lebanon, in order to build a clear vision based on scientific evidence, but such research needs budgets and support (2009, p. 7).

Awards, Recognition, Prestige and Credibility in the Publishing World

Awards are an important motive for and acknowledgement at high-quality publishing. They can help develop the quality of publishing further, since many houses will seek the recognition and work harder especially if money is available. Some popular awards like the Itisalat Award in Sharjah grant up to one million Dirham (US \$270,000) in total for winners in all the categories, making the award popular regionally. Since 2010, a series of awards for book publishing has been launched in the Arab World. Institutions and book fairs provide awards for excellence in different sectors of book publishing, from production to illustration. The awards (often originating in the Gulf States) tend to include a sum of money or the purchase of quantities of books, which help publishers develop and advance their work. For instance, the Arab Children's Book Publishers' Forum initiated a children's book award in 2014, and the Sharjah Children's Book Fair followed suit later in the year. Some awards like Sheikh Zayed and Itisalat (Sharjah) awards have been there for more than five years reflecting continuity and progress.

Awards are known to have a positive influence on publishing, leading to competition between publishers, and the result increases the quality of the production of children's books with new creative advances. In addition, the presence of the award sticker on the winning book itself adds prestige and the publicity in some cases help to increase sales of the titles. Based on my experience as a children's book publisher, having an award-winning book with stickers does not always have a positive influence on the sales while it depends on the titles and the customers' choices. For example, the Ministry of Culture in

Tunisia orders many of Asala Publishing's award-winning children's books for its public libraries. Awards can sometimes create purchases, generate sales, and provide a financial sum to assist publishers, authors, and/or illustrators in developing their work by acting as incentives.

Development in the other Arab Countries and the Effect on Lebanese Publishing

Over the past several years, many Gulf States (particularly the UAE) have allocated special sections in their budgets to develop their book fairs, advance publishing, and promote reading. These policies have had a positive influence on Lebanese children's book publishers. The development of the fairs and the active promotion of reading help to increase the number of visitors, encouraging greater organization and coordination and as a result often better export sales. In addition, promoting reading in the Gulf States is also associated with the increased number of book orders to their schools and associated organisations. For example, The Abu Dhabi Education Council (ADEC) has recently supplied books to the schools in that emirate, increasing the demand on titles from Lebanese publishers. Wischenbart and Jarrous describe the pattern of growth in the UAE and other Gulf States book market “ as that of a typical knowledge-hungry emerging economy...and in striking contrast to the more traditional cultural environments of Egypt or even Lebanon” (2012, p. 12). The relative stability of the Gulf States and the growing economy has been having a positive effect on book purchases in those markets.

The rapid development in the Gulf creates competition among the publishing industry there. Kitab, a publishing organization in Abu Dhabi, has funded translation and original work based on participation in the Abu Dhabi book fair. This has led to a substantial number of children's book translations by an array of small publishers in the Arab World. The opening of new publishing houses in the UAE has relied upon and benefited from Lebanese expertise. For example, many Lebanese authors and illustrators have been asked to work with Emirati children's publishing houses. For example, Kalimat publishing house in the Sharjah has benefited from the expertise of a Lebanese manager to start up the publishing house in addition to Lebanese authors and illustrators moving slowly through the years to having more Emirati employees, authors, and illustrators. The “Lebanese-ation” of Gulf publishing is influencing Lebanese children's book publishers too, since the uniqueness of the publishing style (characterized by high quality of production, unique style of writing and illustration) is not limited to Lebanon alone. The publishing activity in the UAE has undergone encouraging development in recent years (Wischenbart and

Jarrous, 2012, p. 12). Wischenbart and Jarrous add that several local publishing houses have recently been launched in the UAE, leading to “striking” development where “their ambitions, programmes and perspectives have shown a dramatic change, as they clearly seek their benchmarks, professional standards and business goals in comparison to international norms and perspectives rather than in just a local context and tradition” (2012, p. 18). In the UAE Emirati authors are offered training, and many of the books published are customized to the gulf culture and lifestyle.

The result is a richer, more creative, and competitive environment that influences the regional publishing industry and might create a threat to the Lebanese publishers. With more high quality children’s books being published, awareness of the importance of children’s literature has spread throughout the region. More people have become involved in writing and illustrating books, seeking to take part in the international Arab book fairs and be nominated for awards to give themselves a wider exposure.

In their study, Wichenbart and Jarrous stress the importance of the new publishing houses in the UAE, “most of which are newly formed, [and] have set out to produce publications based on local content and aiming at local and regional audiences, particularly in areas such as educational materials in Arabic, practical information, heritage, and children’s books” (2012, p. 12). Wischenbart and Jarrous point out that “[d]omestic production in the UAE still accounts for only a limited share of the market, in comparison to imports from other Arab countries, such as Lebanon, Egypt, Syria and Jordan” (2012, p. 12).

Publishing in other Arab States

The publishing sectors in Syria, Jordan, and Egypt have been marked by the same regional instability influencing the industry in Lebanon. What distinguishes these markets are lower unit selling prices compared to Lebanese books. A lower price point means these books have been able to enter the Lebanese domestic market, and compete with Lebanese books in the wider Arab World. The competition is solely based on price, since Lebanese children’s books are renowned for their high quality of production and content. Publishing children’s book in the Arab North African countries (excluding Egypt) is still at an early stage with no signs of notable development while publishing in the UAE is developing. Publishing in the Arab World affects and is affected by distribution and sales.

Distribution, Wholesale and Retail

Book distribution is one of the important parts of the book chain. Distribution has been placed here, separate from the discussion of the rest of the book chain, since it is highly linked with international markets in the Arab World (which is the main market for Lebanese publishers). Book distribution in the Arab World is often disorganized and needs an updating of its tools and techniques (Hashem, 2010, p. 123). As discussed before in the Literature Review, one of the biggest problems in the Arab World is book distribution. There are very few distributors in the Arab World and they are usually limited to certain areas and specialties. As a result, the publishers tend to do their own distribution. In their study, the CRI discovered that 86% of publishers distribute their books directly in the local market [to schools and school book fairs for example], 75% through national book fairs [including mainly Beirut International Book Fair and other school book fairs], 61% via bookshops, while 72% of houses distribute their books internationally without a mediator [directly to ministries for example] (2010, p. 83). Publishers tend to fulfil the role of the retailer since there are fewer bookshops in the Arab World than in the Western markets, and bookshops in Lebanon and Egypt differ from those in the Gulf and Saudi Arabia, where large stores like the Kinokuniya bookshops in Dubai are more common.

Hashem stresses that it is common in Lebanon to read “for publishing and distribution” next to the name of the publishing house, reflecting the fact that most houses distribute their titles themselves (2010, p. 111). Hashem points out that distribution in the Arab World is often different from Western markets, since distributors there do not cover a wide market, sometimes pirate books, often fail to pay on time, are unprofessional in organizing the business transactions, rarely use tools to expose customers to titles, and lack a unified data base. All of these factors make book fairs a primary way for readers to learn about new titles, which in turn limits distribution to the main big cities where book fairs are held.

Book Fairs

Book fairs in the Arab World are the primary selling opportunities for publishers. The role of the book fair differs from that in Europe, where the major book fairs are for wholesale and industry professionals. As a result, Arab publishers ship large quantities of their books, both old and new titles, to the fairs to sell them to the public, often with consumer discounts. Detailed information about book fairs is presented Chapter Three, Chapter Four, and Chapter Five.

The CRI notes that the majority of Lebanese publishers use book fairs to market their titles in the Arab World. This greatly hinders bookshops, since customers get better prices and a wider selection from fairs. The CRI argues that due to the lack of big distributors in Lebanon and the high charges that distributors place on publishers, Lebanese publishers find it safer to distribute directly at the more than twenty book fairs in the Arab World. CRI adds that the Lebanese houses generally do not exceed one-third of the general publishers attending fairs in other countries, noting that most publishers participate in local and Arab book fairs, while less than half of the firms take part in fairs in non-Arabic-speaking countries (2010, pp. 88-89). In their study, CRI discovered that the largest percentage of books sold by Lebanese publishers is through Arabic book fairs, followed by sales through bookshops, at local book fairs, and at foreign book fairs [see table below] (2010, p. 89).

Book fair participation (CRI) – Table 3

Local book fairs	Arab book fairs	Non-Arabic speaking countries
89.6%	82.6%	40.9%

Book sales by Lebanese publishers (CRI) – Table 4

Arabic book fairs	Bookshops	Local book fairs	Foreign book fairs
35.3%	34.7%	13.4%	4.4%

School and college book fairs	Individual book fairs	Online bookshops	Online	Others
2.7%	2.7%	1.6%	3.2%	2.0%

Hashem points out that the Arabic book fairs, which occur each year in all Arab capitals, are the only chance for the general public to have a general look at the publications in that language. She notes that religious books and reference books (used for studies) are the only two constant elements selling in the market, with the former outweighing the latter (2010, pp. 116-117).

Private business institutions dominate Lebanese publishing, with 80-90% of production targeted towards export markets like Saudi Arabia, Algeria, Morocco, and Egypt (Hashem, 2010, p. 122). Publishers sell their books at book fairs at special prices with discounts reaching 40% off the original price, and the remainders are usually sold to bookshops afterwards to avoid the cost of return shipping (Hashem, 2010, pp. 122-123). It is worth

nothing that the role of the book fair curbs the capacity of publishers to pirate popular books. The book fairs are a means of highlighting the official publishers and their books.

Piracy

Piracy of books exists in the Arab World as elsewhere, where popular books in high demand are copied and sold without permission. The copyright and intellectual property laws differ in every state; in some Arab states it is easier to initiate legal proceedings, whereas in others the legal bureaucracy renders it futile to pursue a breach of copyright. Hashem observes that the spread of piracy in the Arab World affects the data (where number of titles sold by publisher, for instance, is not the right number since pirated books are being sold), making it increasingly difficult to acquire accurate statistics on book production and distribution (2010; p. 20). More than 67% of Lebanese publishers have stated that their books have been pirated where the publishers' books have been reprinted with the publishing house's name (73.2%), photocopied into booklets (56.3%), or reprinted under another publisher's name (46.5%) (CRI, 2010, p. 98).

Hashem points out that both widespread piracy and the small Arabic market for books keep profit margins low for Lebanese publishers, who pay all the costs of doing business (2010, p. 56). As noted in the Authors and Illustrators section of this chapter, some authors in the Arab World pay the costs for publishing their own books. This leads the publisher to cut down on expenses, with authors often the easiest targets due to their ignorance about how to protect their rights and the lack of statistics and numbers about sales (Hashem, 2010, p. 56).

Wischenbart and Jarrous portray publishers as seeing

themselves increasingly caught in a trap due to piracy, as they are not in a position to join the ranks of the much larger entities and organizations from Europe or the United States, who fight piracy from a much stronger and better organized position as compared to those from such peripheral and highly fragmented markets as those in the Arab World. (2012, p. 10)

There are many reasons to pirate books, usually including popular books that are ordered in large numbers. In the Arab World, censored books sometimes become more appealing to customers, thus raising demand and the likelihood of piracy. Piracy can be more difficult for children's books, since the quality of colours and printing can be affected when the original files are not used for printing.

Piracy has many negative effects on publishing in general and publishers specifically since publishers go through high risks when publishing and printing, hoping to generate high profits from popular books, which if pirated can lower profit margins and can lead to mistrust with authors, printers, and distributors. Wichenbart and Jarrous interviewed several publishers and stated that “the impact of piracy has been so strong that it has reached the point of destroying the economy of books in the leading Arab book publishing countries, such as Lebanon” (2012, p. 10). In my experience as a children’s book publisher piracy plays a role depending on the market and the genre of book. For example dictionaries are known to be more pirated than other genres of books. In addition, in some markets like the Gulf States some distributors are asked to get a letter or Certificate of Origin from the publisher to support the order of large amount of books.

Government Legislation and Customers’ Control and Restriction

There are extensive regulations pertaining to topic selection, production, and publication of books in the Arab World. In Saudi Arabia, for example, books are to be approved and have to acquire a serial number for importation and sale. Since most of the Lebanese children’s book publishers rely heavily on other markets to sell their books, they usually try to publish within the remit approved by the committee guidelines, to encourage demand and facilitate authorization.

In her study, *Love and Sexuality in Children’s Literature in Lebanon*, Katy Kattar concludes that

this subject is almost totally absent in modern Arabic stories, although love was very present in the old folktales that an essential part of our cultural heritage...However, instead of showing some progress, today’s stories completely avoid certain subjects. (2009, p. 12)

Fadia Hoteit observes two kinds of censorship affecting children’s book publishing in Lebanon, both internal self-censorship (including the writer’s religion, attitudes, and morals), and external censorship imposed by society, parents, the market, and governments. In her research, *Censorship of Children’s Book in Lebanon* (2009, p.100), Hoteit observes that there are factors governing the censorship of writing for children: “the forbidden subjects”, “money”, “the educational aspect”, and “complying with modernity”.

In the Arab World subjects like “violence, sexuality, confessionalism [distribution of political and institutional power among religions], politics, [and] parents” are not popular in children’s books (Hoteit, 2009, p. 100). The nature of the Arab countries, shaped mainly by religion, the rulers, the educational systems, and the limitations by society and culture is

reflected in the literature presented to children. The topics mentioned above are not presented to children, and books containing them are banned from entering some Arab countries and/or are not ordered by schools or bought by parents. Political leaders, religion, authority (including that of parents) are not to be discussed in Arabic children's books.

Due to the small markets and the aim of selling the 3,000 printed copies of titles in the Arab World, money is a second factor affecting publishing, where Hoteit refers to the factor as "the writers' and publishers' economic worries" (2009, p.100). Most publishers prefer to publish "safe" titles that can sell well in the Arab World.

A third factor that Hoteit mentions is "[a]rtistic considerations: the form and print and their relation to the local environment" (2009, p. 100) where publishers choose to create characters and settings that are general and not specific to one country in order to reach the Arab market and not limit themselves to one country or a certain area.

The fourth factor that Hoteit discusses is "[t]he educational aspect: the necessity of having educational aims" (2009, p. 100). In the Arab market a big percentage of the sales are made at book fairs and to schools and parents (buying books for their children that can teach new ideas). Many publishers aim at publishing children's books with educational aims hoping to generate more sales. According to Hoteit the school itself performs censorship not only on publishers but also on authors' and children's tastes (2009, p. 113).

The fifth and last factor that Hoteit discusses is "[c]omplying with modernity: the social stereotypes" (2009, p. 100). Most of the times publishers choose "safe" books that portray images and situations that are acceptable to a wide audience, where, for instance, the father is the working and authority figure in the house, and the publishers avoid special problems like divorce.

As a Lebanese publisher, with participation in book fairs and access to buyers and consumers of books, over the years Asala Publishers received substantial feedback and insights from teachers, parents, and government officials about who buys books from book fairs. Over the years, some topics and illustration styles have been adopted to ensure better sales in the Arab World, for instance, illustrations avoid depicting girls in short skirts and sleeveless tops. The environment that the illustrations are based on is not typically identifiable as Lebanese, but is more general, and the characters are more likely to be depicted with darker hair and eyes. Regarding text, Asala Publishers try to publish topics that schools can use as resources. Parents, who buy books for their children, often

concentrate on topics needed or ordered by schools. In Chapter Three, Chapter Four and Chapter Five I will look at the customers in the Arab World and the criteria the customers follow to purchase books.

The Arab market and the need to sell books outside Lebanon force publishers to adopt a kind of self-censorship, trying to reach as many customers as possible, and avoiding topics that would only attract a small number of readers.

Reading

Existing research endorses the perception that Arabs are not known to be enthusiastic readers. The 2010 CRI study reported that when Lebanese people are asked about their leisure activities, television dominates as first preference, going out to see friends is second, followed by going out for fun. Reading is the fourth in order of preferences. CRI found out that one-third of Lebanese read rarely or do not read at all, and not more than 17% of the population reads daily, and an average of approximately two books are purchased a year for every individual (p. 3). British consumers spent 3.182 billion pounds on books in 2012 (Tagholm, 2013) around US \$49.7 a year per person. This presents another challenge for publishers where selling books is harder to people who do not read much. Pricing plays a significant role in shaping demand, since the cost of the book is higher when lower quantities are printed.

The average price of children's books in Lebanon is US \$5, which might also limit the number of titles bought by readers or parents. Existing surveys on reading in the UAE and in the wider Arab World "have highlighted [that] reading, education and the acquisition of knowledge are embraced by the local younger generation much less enthusiastically than, for example, their peers in India, China or Korea" (Wisichenbart and Jarrous, 2012, p. 33).

Hashem observes the core reasons affecting reading, include a series of obstacles:

- inaccessibility of books
- high costs of production (when compared with number of titles sold)
- concentration of bookshops in cities
- the quality of books found
- topics related to fairy-tales and living in villages are distant from the child's immediate life and a lack of books for young adults in Arabic

- the problem of language (the distance between spoken and written Arabic),
- systems of education (reading is related to homework and summer reading activities where children are not encouraged to write their own views but follow guidelines and the school books that are far from children's lives)
- the quality of reading (60% of books that are borrowed from public libraries are information and scientific books and the use of public libraries is mainly for studying) (2010, pp. 152-156)

Hashem notes that some parents find reading an “unsocial activity” in Lebanese society where a children can be blamed if they isolates themselves by reading instead of being involved in family activities, while parents are not disturbed by the television that is available most of the time (2010, p. 156). Wischenbart and Jarrous present a negative picture on reading habits, noting that “[du]e to a lack of specific representative data on reading habits, and the penetration of new digital channels, with specific regard to books, it is also next to impossible to develop solid strategies in this respect” (2012, p.10).

Conclusion

A complete understanding of book publishing and marketing in Lebanon is limited by the lack of existing statistics and studies to draw upon, an unstable political situation, evolving Arab business ethics, the nature of the family-owned publishing houses, and the slowly changing market. All of these factors combine to make the analysis of the publishing scene problematic.

Bashour identifies several obstacles to publishing in the Arab World, including high poverty levels, the limited number of public libraries to complement school libraries, the traditional way in which schools teach the Arabic language compared to how foreign languages are taught (which draws children to Western books), and the rise of e-books (2012, p. 30). In addition, Hashem contends that the Arabic book business is still weak, despite the large geographical area it covers, due to the high levels of illiteracy, the limitations on book movement and freedom of speech, and distribution problems (2010, p. 20).

Samah Idriss takes a more broad-based approach arguing (in Arabic) that many factors are pushing culture backwards or making it progress slowly “like a turtle”:

the Arab being busy trying to find a decent way for living, emigration, or buying a new car; weak trust of cultural institutions in the community; the slow change in the processes and the complicated language used by children's book authors; the ministry has a budget of less than 1% of the government balance; the amount that the Ministry of Culture provides Lebanese publishers reaching a maximum of US \$2,000 a year; and religious and sectarian conflicts in unions. (2010, p. 74)

These factors are reiterated by the BRC. The committee states that development of the book business in Lebanon will not be accomplished unless all the related Ministries work together (mainly culture, education, higher education, publicity, public affairs, economy, and finance). The process will require a joint effort between different sectors related to book production and distribution, collaborating with the MoC, unions, and NGOs under a whole cultural and national policy to develop book and promote reading in Lebanon (2009, p. 7). In sum, a collaborative, coordinated, comprehensive, and prescribed policy mechanism across the Lebanese government, including the publishing private sector, is necessary for the industry's advancement.

It can be argued that publishing in Lebanon is a complicated process with many factors affecting its progress. If parents do not provide their children with positive reading experiences, by reading bedtime stories for example, it is likely that children will not read since children tend to imitate their parents in their early years. Similarly, if Arabic is being taught in a rigid and old-fashioned way, children will not enjoy Arabic and will not read for fun in the language. If publishers continue to imitate each other, use the same old techniques, and copy/paste foreign publishers, it will be difficult to discover new ways that work better in the Arab market. If the government refuses to fund necessary research into the publishing sector, the situation will be more difficult. The most important idea is that if people are hungry, sick, scared, and dying, reading will likely not be an immediate concern.

Many of the obstacles influencing Arabic-language publishing are likely to persist. However, the situation in the Arab World is changing and the Arab Spring and the rapid development in the Gulf States are slowly pushing the market in a new direction. The history and experience of Lebanese publishers will surely play a major role in their survival.

Despite several shared characteristics with the publishing trade in general, children's book publishing has a distinct role. This study outlines the need for a thorough and comprehensive analysis of the children's publishing sector across the region, in order to better understand the situation and develop the publishing business. The need to study the

position of children's book publishing in Lebanon is self-evident. In the next chapter, a detailed analysis of the children's book publishers in Lebanon is undertaken to study their current status, their markets, the marketing techniques used and the future plans aiming to understand the problem and the situation from the publishers' side.

Results of Primary Research into Lebanese Children's Book Publishers via Questionnaires

Introduction

Most of the references available in the Arab World agree on the fact that there is a shortage of professional research and hard data about publishing in the region, including Lebanon. When studies and resources are found, they usually address publishing in general and not children's book publishing in particular. These problems make it difficult to find resources on children's publishing in both Lebanon and the wider Arab World.

General views and hypotheses have been offered to discuss the situation in broad strokes, but publishers' opinions and situations can vary depending on their size (number of staff and size of book lists) and primary markets.

To this end, my research has sought to address the data deficit and has set out a series of questionnaires (for publishers, customers, NGOs, the Ministry of Culture, and bookshops) developed to fill in the gaps and attempt to answer the problems found above. One questionnaire targeted children's book publishers in Lebanon to assess and analyse their current positions. This chapter considers the publishing situation from the Lebanese children's book publishers' points of view, emphasizing their markets, marketing techniques, and future plans.

Lebanese Publishing Houses Questionnaires

Information about Lebanese children's books is needed to assess the publishers' views and positions. It was decided that the best method for this investigation was to adopt a questionnaire for publishers, a study that can be repeated and replicated. A search was undertaken for Lebanese children's publishing houses that publish in Arabic and have published more than twenty titles in the past five years. Out of twenty-two such firms, responses were received from nine publishers. The design of the questionnaire ranged from general information about the publisher to more specific techniques and points of view. The questionnaire was divided into four parts: part one covered information about the publishers; part two covered the market; part three the marketing techniques used; while part four addressed future plans (See Appendix E for questionnaire template).

Part One:

The Publishing Companies

The general status and size of a publishing house can be known through several signs, including number of employees, number of titles, their specialization, and techniques used in marketing. In addition, what publishers write about their company is important in evaluating their point of view, and how the company positions itself in the market. To provide background material for the questionnaire results and analysis, information about the publishing houses was researched mainly through the publishers' own websites and Facebook pages, and the catalogue of Arab Children's Book Publishers Forum (ACBPF). Below is general information about the publishers who took part in the survey.

Asala Publishers was established in 1998 under the umbrella of Dar Annahda Al-Arabiya. Asala Publishers publishes Arabic children's and activity books, while Dar Annahda Al-Arabiya is an academic publisher. Asala's projects and aims include producing books in formal Arabic, raising children's awareness of social problems, organising workshops for parents and teachers, organizing book tours, and promoting reading with the coordination of organizations (ACBPF, 2013, p. 77).

Tala Establishment was founded in 1985, and produces Arabic educational material and children's books. It offers workshops for teachers and consultancy for educational institutions, and cooperates with international institutions like UNESCO, UNICEF, UNDP, and some Ministries of Education (*Tala Establishment*, 2014).

Dar Al-Adab was established in 1956 to publish literature, translations, fiction, poetry, and plays. The company hopes to raise awareness and contribute to the continuation of cultural development that Arabs have made over previous centuries (*Dar Al Adaab*, 2014). Around fifteen years ago Dar Al-Adab started publishing children's books.

Dar Alkitab Al-Lubnani was established in 1940 "and a branch was born in Cairo from the mother company named Dar Al-Kitab Almasri" (ACBPF, 2014, p. 61). Dar Al-Kitab Al-Lubnani claims to be "the most important publishing house in Lebanon and the Arab World", publishing "important" books including cultural books, dictionaries, encyclopaedias, school books, university books, and children's encyclopaedias (ACBPF, 2013, pp. 60-61).

Dar Al Maaref was established in 1948 and began "publishing school books and distributing Egyptian books in Lebanon", before starting a new line of publishing in 1968,

to include historical books in literature and Islamic fields. Finally, in 2000 they began publishing children's books and soon "became a leader in that field" (ACBPF, 2013, p. 81).

Dar El Ilm Lilmalayin was established in 1945, making it the "oldest and largest leading privately-owned publishing and distribution house of Arabic books and materials in the Arab World" (ACBPF, 2013, p. 67). Dar El Ilm Lilmalayin claims to "distribute, annually, more than four million books in different subjects: dictionaries, encyclopaedias, cookbooks, business linguistics, schoolbooks, literature, and medicine" (ACBPF, 2013, p. 67).

Arab Scientific Publishers was established in 1986 by the Shebaro brothers, and specializes in modern science books in Arabic. The firm has 3500 titles covering topics such as computers and the internet, natural sciences, health, family books, young adult books, children's books, cookery books, decoration, travel, and sports (*Arab Scientific Publishers*, 2014).

Dar Al-Moualef was established in 1990. Dar Al-Moualef portrays themselves as a "[c]ultural institution engaged in publishing, translation, and distribution, specialized in children's books and literature as well as family books" (ACBPF, 2013, p. 59).

Yuki Press was established in 2004 "to fill the gap in the market for distinctive Arabic books for children. Since then it branched out into English and French... the company philosophy is to achieve excellence and beauty in all its publications, which are characterized by superb quality and design" (*Yuki Press*, 2014).

After reading their publicly-available information, it is noticeable that many publishers are subjective about their work, often portraying an image of being the best (this is no different than publishers around the world). Few facts about their sales, markets, and awards are given in the paragraphs defining their publishing house. The information provided by ACBPF is supplied by the publishers themselves, so discrepancies are not noted in the catalogue. Dar El Ilm Lilmalayin's claim to be the largest and oldest publishing house is not supported by evidence, since the size of the publishing house would have to be compared with many factors including the sales figured, number of titles published, market share, and growth. Dar Alkitab Al-Loubnani was established in 1940, making it five years older than Dar Al Ilm Lilmalayin, and claims to be the "most important" publishing house in the Arab World.

In the section below, I hope to draw a clearer picture about every publisher, relying on the information gathered via questionnaire responses.

Number of Employees – Table 1

Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
10	4	12	8	10	50	53	7	2

Table 1 presents the number of employees in the Lebanese publishing houses. In contrast to the UK (Egmont, second in the UK's children's book market, has more than 200 employees (Egmont, 2015)), publishing houses with fifty employees are regarded as some of the biggest in Lebanon. Another indication of the size of the publishers can be seen while visiting the Beirut International Book Fair, where Lebanese publishing houses make sure that the size of their stand reflects their position in the market. Dar Al Ilm Lilmalayin and Arab Scientific Publishers take up to 100 square-meter stands (the biggest space given in the book fair) and display in a prime location at the entrance of the fair. In Lebanon, several small publishing houses like Yuki Press have been established over the past fifteen years, many of them managed by authors themselves, and the smaller publishers' stands are usually small or collective stands in the book fair. Hashem attributes this to the mistrust between authors and publishers based on the print runs and royalties (2010, p. 55). Authors establishing their own publishing houses usually have limited capabilities and experience in publishing, tend to publish on a small scale, and have smaller teams.

Employees in Marketing and Sales – Table 2

Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
3	1	3	3	2	8	6	2	2

The size of the team working in sales and marketing at each publishing house can be seen in the table above. Data from Table 1 can be compared with that in Table 2 to reflect the capacity each publishing house is investing in marketing their books. With the exception of Yuki Press, it is apparent that publishing houses have between 10% to 38% of their employees working in marketing. Yuki Press is a small children's publisher, in terms of number of employees and titles published, and do not directly take part in most of the international book fairs but send their materials with other publishers or distributors. Effective book marketing demands a network of bookshops and good relationships with customers, and this process puts constraints on small publishing houses that cannot afford to maintain a large number of representatives (Hashem, 2010, pp. 108-109). The small size of the marketing team can affect the distribution and marketing of books, since fewer visits are made to customers and distributors in Lebanon and the Arab World. For instance, when two or more book fairs in the Arab World are taking place at the same time, the publisher should have the ability to send different employees to different locations to guarantee representation. In addition, during some busy book fairs, more than one representative is needed on the stand, especially when school groups visit at the same time or when multiple distributors come to collect their orders. There is evidence that publishers in Lebanon and the Arab World need to place more effort on marketing and distribution, especially by having bigger marketing teams that can be present in book fairs and other events to market and sell.

Do you produce other books besides children's books? - Table 3

Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
no	no	yes	yes	yes	yes	yes	yes	no

A positive correlation was found between the size of the publishing houses, the number of employees, and the availability of titles on their full lists (not only children's books). The larger publishing houses (measured in terms of total employees and marketing employees) publish titles other than children's books. Interestingly, this correlation is related to the slow development of marketing children's books in Lebanon and the Arab World. The small number of people working in marketing (and in the publishing houses in general) influences the scope of the regional market coverage for publishing houses concentrating on publishing children's books.

Number of Children's Book Titles Produced – Table 4

Publication year	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press	Total
2006	20	4	55	2	80	35	124	64	2	386
2007	35	3	60	2	120	36	31	80	0	367
2008	65	9	80	2	170	25	12	95	2	460
2009	60	4	75	2	230	16	3	100	2	492
2010	118	8	92	2	300	19	8	120	6	673
Total	298	28	362	10	900	131	178	459	12	2378

Table 4 presents the number of children's books produced annually by each publishing house. What is interesting in this data is that each publishing house is different from the others in terms of development over the years and the size of production. Asala, Al Maaref, Dar Alkitab Alloubnani, and Al Moualef have been increasing the number of titles printed every year. Tala, Al Adab, and Yuki Press have been either constant or changing only slightly every year. Arab Scientific Publishers published a large list in 2006 and greatly diminished the amount in the years to follow. Again, this highlights the differences between publishing houses relating to their publishing policies and perhaps to the fact that Arab Scientific Publishers realised that they could not compete effectively with the number of niche children's publishers while Dar Alkitab Alloubnani, Al-Maref, and Dar Al Moualef were aware of the growth of this area and decided to invest more into children's book publishing. As for Asala Publishers, publishing more children's book titles is part of the publishers' policy to increase their market share and presence in the market. On average, there has been a constant increase in the number of children's book titles published every year in Lebanon; this is a sign of development in the industry and the markets in general, highlighting the profitability, bigger market, keenness of parents, and new customers. The rise in the number of titles published in Lebanon and the Arab World has increased competition, and might be one of the reasons for publishers to increase the discount percentages available to customers in book fairs.

Number of Books Published (Not including children's books) – Table 5

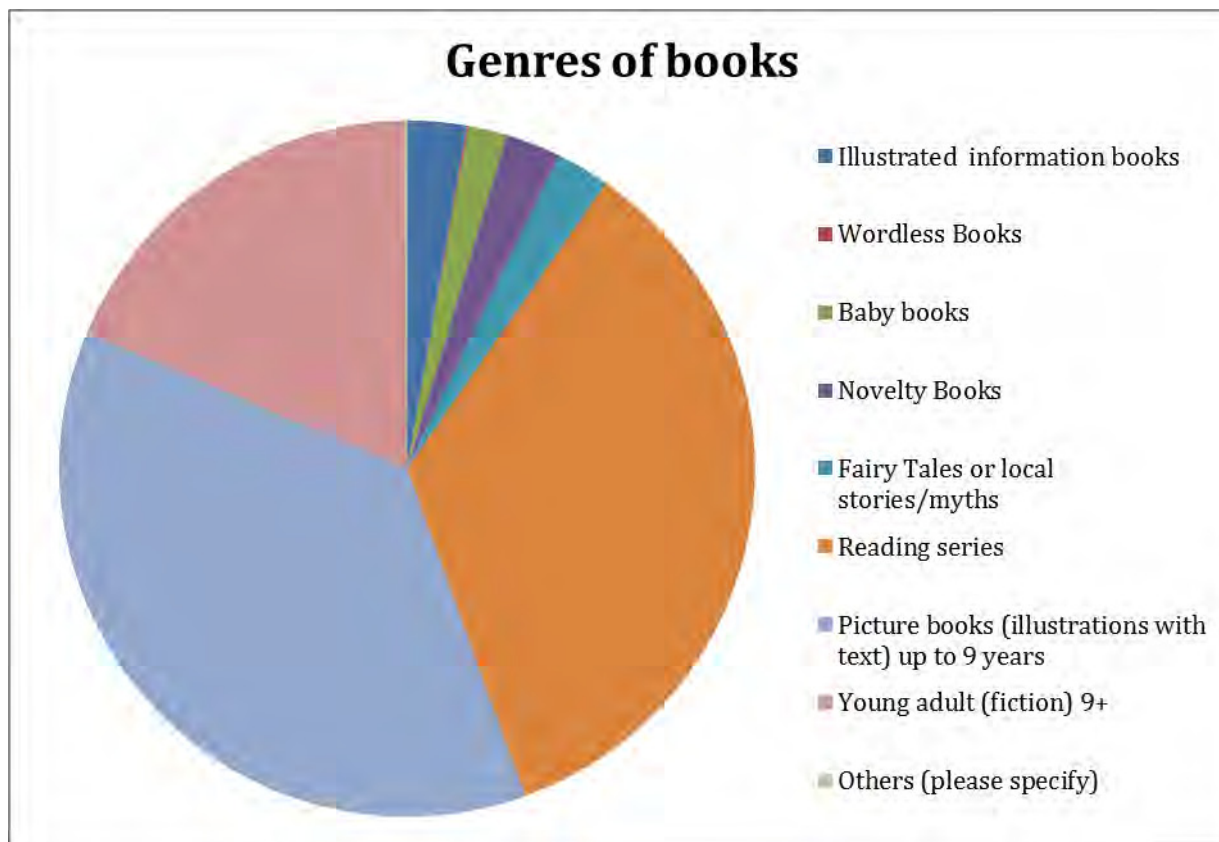
Publication year	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
2006	0	0	25	40	350	63	185	5	0
2007	0	0	28	42	370	81	243	10	0
2008	0	0	35	45	380	57	252	15	0
2009	0	0	35	44	410	48	247	40	0
2010	0	0	28	36	430	42	306	50	0

It can be seen from Table 5 when compared with Table 4 that Arab Scientific Publishers has shifted its focus after 2006 to titles other than children's books perhaps trying to stick to what they did best (publishing, marketing, and selling). Dar Al Moualef and Dar Al Maaref have been increasing production in both children's books and other books. The other publishers showed similar numbers throughout. 2006 and 2007 were difficult years for Lebanon due to the war with Israelis and internal political strife. According to the Annahar newspaper, many national and international events have affected economic development in Lebanon starting with the assassination of Rafik Harriri in 2005, the July War in 2006, the global financial crisis in 2008, and the Arab Spring after 2010. However, unlike other countries, Lebanon recovered quickly from the financial crisis, registering a GDP increase of 9.2% between 2007 and 2010, compared to the increase of 5.06% between 2000 and 2004 (*Financial and Economic Development in Lebanon Between 2000 till 2014 Confirming the Need to Restructure the Economy and Impose Financial Changes*, 2014). There is no clear link between the wider economic situation and the number of titles published yearly by Lebanese publishers, since the numbers and development vary between publishers.

Genre and format of books produced – Table 6

Children's books format or genre	Number of titles
NON FICTION	
Illustrated information books	265
Wordless Books	8
Baby books	172
Novelty Books	249
FICTION	
Fairy Tales or local stories/myths	238
Reading series	3545
Picture books (a format not a genre) (illustrations with text) up to 9 years	3548
Young adult (fiction) 9+	1775
Others (please specify)	12
	9848

Genre and format of books produced - Figure 1



The data in Table 6 and Figure 1 was established by adding the number of titles produced by publishers in each genre or format taking part in this study. Non-fiction makes up around 10% of the books published by the publishers in this study, including information books, wordless books, baby books, and novelty books. The graph shows that publishing picture books and reading series are popular among publishers. Explanation of each genre and format will be given in the sections below in addition to the percentages of translated books trying to identify if publishers have the tendency to translate some genres and formats of books more than others. The results from the figure above will be discussed and linked with the book fair results in Chapter Five.

Tables of Numbers and Percentages of Non-Fiction Children's Books

Non-fiction books are related to facts and events, and are used by parents and schools to teach concepts and can be used as reference books.

A. Information Books - Table 7

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Number of titles	40	0	No answer	0	40	100	34	51	0
percentage of Translation	0%	0%	No answer	0%	80%	30%	66%	90%	0%
From Language	/	/	No answer	/	German 5% English 90% French 10%	English	English	French English	/

Information books for children provide children with information and material on a variety of topics using pictures and words. An information book can be limited to one concept, such as shapes and colours for young learners, or can cover wider concepts like animals and their habitats and lifestyles. It is apparent from this table that more than half of the publishers taking part in this study publish information books, with the majority translating them from other languages, especially English and French. Information books are also often printed and translated by publishers who are not included in this study. Information books are displayed and sold in large numbers in Arab book fairs, especially to schools. Schools are one of the main markets for publishers. Publishers sell books to schools in different ways, including reading lists and school book fairs (which will be discussed in detail in Part Three of this chapter). In addition, books in the Arab World are viewed as sources of information and educational resources. As a result, information books can satisfy the need to learn.

B. Wordless Books - Table 8

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Number of titles	1	0	0	0	2	5	0	0	0
percentage of Translation	0%	0%	0%	0%	100%	5%	0%	0%	0%
From Language	/	/	/	/	English	English	/	/	/

Wordless books (books without words) rely on pictures to tell incidents or a story. Wordless books can be used with young children and are sometimes enjoyed by older ages. Schools and parents use them to help children express themselves and tell the stories in their own words. Older children can express themselves and tell their own story in writing, too. Wordless books can be also used for art appreciation. Wordless books published by Al Maaref and Dar Al Ilm Lilmalayin are both translated from English showing the popularity of translating from English even with wordless books.

Wordless books are rarely found in the Arab World. In our experience as children's book publishers, the only wordless book we published did not sell well, since parents and teachers asked for words on the page to help children learn the Arabic language.

C. Baby Books - Table 9

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Number of titles	0	0	0	2	82	7	0	16	0
percentage of Translatio n	0%	0%	0%	0%	100%	63%	0%	80%	0%
From Language	/	/	English French	/	English	English French	English	French Arabic	/

Baby books are for infants and young toddlers. They are usually lullabies, finger plays, nursery rhymes, and are sometimes wordless. Baby books are usually hardcover, plastic, or cloth in order to withstand vigorous use. The phrase “baby books” is often translated as “young children” in Arabic. Even though explanation of the genre was provided in the questionnaire, some publishers were confused and included other titles like picture books in this category. Publishers were contacted by phone on 10 February 2014 to confirm the numbers and clarify misunderstandings. Dar Alkitab Alloubnani, Tala, Arab Scientific Publishers, and Dar Al Adab confirmed that they did not publish baby books. As for Dar Al Maaref and Dar Al Ilm Lilmalayin, they confirmed having a variety of titles for children less than two years old. Al Moualef confirmed they have published sixteen baby book titles. As a result, Table 9 presents the confirmed results gathered after contacting the publishers. Baby books are not popular in the Arab market due to the nature of the market itself where sales are highly linked with the school market and the habit of reading for babies is not well established.

D. Novelty Books – Table 10

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Number of titles	20	0	18	0	110	50	50	1	0
percentage of Translation	100%	0%	65%	0%	90%	50%	95%	0	0
From Language	English	/	English French	/	English 90% French 10%	English	/	English French	/

Novelty books have extra features ranging from sound buttons and pop-ups to different textures. Novelty books are usually eye-catching on the shelves or on book fair tables in order to attract young children. The costs of novelty are usually higher than normal books due to the higher quality production material needed. Co-publication with foreign publishers is one of the most popular methods used in Lebanon to produce novelty books. Producing novelty books requires specialized printing houses with some techniques sometimes done by hand. When publishing houses print co-editions, the pricing costs come down, benefiting both parties.

More than 50% of the novelty books published in Lebanon are translated from English or French. This is due to the higher cost of producing novelty books and the offers that French and UK publishers obtain when doing co-editions to secure bigger print runs. In addition, the expertise of producing high quality novelty books is not well-developed in Lebanon or, if found, is very expensive.

Tables of Numbers and Percentages of Fiction

Fiction books for children include non-factual events invented by the author, and sometimes include poetry. Fiction helps the child see new situations and understand other people's points of view. Some books take children to a new world, which can help the reader widen his/her imagination. Around 90% of the children's books published are fiction, including many translations. It is apparent from the previous Table 6 that fiction is especially popular among publishers in the study, reflecting its popularity among the Arab reading public.

E. Fairy Tales or Local Stories/Myths - Table 11

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Number of titles	5	4	120	0	65	20	4	20	0
percentage of Translation	20%	0%	2%	0%	70%	0%	25%	5%	0%
From Language	/	/	English French	/	English	/	English	French English	/

Fairy tales and local myths are old stories that have been transmitted orally over time. Fairy tales and myths can have fairies, supernatural characters, and magic in them. Basic moral lessons are conveyed in these stories where wrong is punished, while the right behaviour or the “good” character wins at the end. The results, shown in Table 11, indicate that these traditional genres are still popular in the Arab World for many reasons: these stories are free to publish and publishers do not have to pay royalties, children enjoy reading stories previously told them by their parents, and they are “safe” and uncontroversial in many countries in the Arab World and can cross borders without being stopped. Hashem stresses that publishers pay high costs with a small margin of profit, and tend to reduce the expenses paid as much as they can (2010, pp. 55-56). “Free books”, with no royalties to pay, and popular books are a safe choice to publish for publishers in Lebanon.

F. Reading Series - Table 12

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Number of titles	110	0	3000	0	49	200	106	78	2 series
percentage of Translation	2%	0%	36%	0%	100%	100%	76%	10%	0%
From Language	/	/	English French	/	55% French 45% English	/	English	French English	/

Reading series are graded by level for beginning readers, starting with very few words and increasing in number and complexity. Books in reading series are usually medium-to-small-sized where they can fit in a school bag or small shelves in the library. In addition, these books are reasonably priced since they are sold as a series.

“Arabi 21”, a project by the Arab Thought Foundation funded since 2000 by the King Abdul-Aziz City of Knowledge and Technology, is working on promoting reading in Arabic in the Arab World. The team produces guidelines to divide books according to reading progressing-levels suitable for classroom libraries. “Arabi 21” joined with eleven publishers in the Arab World to publish graded reading series. Asala Publishers, Arab Scientific Publishers, Dar Al Ilm Lilmalayin, Dar Al-Maaref, and Dar Al-Moualef are among the publishers (ATF, 2013, pp. 5-13). The “Arabi 21” project was an important catalyst encouraging publishers to publish graded reading books.

From my experience as a publisher, we send the books to “Arabi 21” before the books are published. Their team gives the books their levels and sends us the symbols to include on our cover. In turn, “Arabi 21” promotes the books through their catalogues and conferences in the Arab World.

Reading is a skill that can be developed with repetition and practice. As a result, there is a high demand for graded reading series among educators and parents to help children become better readers. In the Gulf States, for instance, where classroom libraries are being established and developed in many schools, the reading series are popular since they often address topics included in the curriculum. From the data in table 12, it is apparent that publishers are moving towards the international trend of publishing graded reading series.

Dar Al Ilm Lilmalayin is known to have a large slate of graded reading books, organized by reading ability level, that have been among the top three bestselling lists at the Beirut International Book Fair for the past several years. Further investigation had to be carried out to make sure that the numbers in the above table were correct. Dar Al Ilm Lilmalayin was contacted by phone on 10 February 2014 and confirmed that more than 200 titles were published under the reading series in six levels, all in translation. It is worth noting that a large percentage of the graded reading series are translations, which affect the levels that the books are placed in. The vocabulary chosen and the sentence composition are important elements in graded books, and when books are translated short words might have longer synonyms in the other language (for example, the translation of elephant, a long word, into Arabic results in a simple three letter word). The results highlight the need to research the effect of translation on graded reading series, and the need to consider the language while translating and placing books in different levels. In addition, the result also suggests that publishers have limited knowledge of graded reading series and language changes in translation. The results highlight the need to produce non-translated Arabic graded reading series for the children to benefit from.

G. Picture Books (illustrated with text) up to 9 years - Table 13

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Number of titles	700	65	2000	10	150	300	26	55	10
percentage of Translation	9%	0%	40%	0%	80%	200 books 66%	93%	60%	0%
From Language	/	/	English French	/	30% French 70% English	/	English	French English	/

Picture books have a combination of text and illustrations, and feature illustrations that play a major role in storytelling. In addition, illustrations help the child acquire a taste for art and complement the text. Picture books can have very few words for early readers and add longer paragraphs for older children. They can discuss many situations and stories, and are essential to help children see matters from different perspectives.

In both Lebanon and other Arab countries, picture books are ordered for school libraries, for teachers to use as an extra source of discussion in the classroom, and for children for vacation reading and silent reading periods. It is apparent from Table 13 that picture books are popular among publishers. The fact that a high percentage of the picture books are translations from English or French plays a role in the way the topics are presented to the children, which sometimes might be far from their immediate environment (discussed previously in Chapter One).

H. Young Adult (fiction) ages 9 + - Table 14

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Number of titles	100	0	1200	0	14	100	269	90	2
percentage of Translation	0%	0%	40%	0%	0%	0%	45%	30%	0%
From Language	/	/	English French	/	/	/	English	French English	/

Young adult books are considered a genre of their own, since they introduce topics and ideas that are more complicated than in younger children's books, due to the level of child development and ability to understand situations with a new perspective. Appleyard defines the role that readers take at this level as "the reader as a thinker" (1994, p. 14). Young adult readers are curious to learn about values and beliefs in life. Books presented for this age group can be more complicated than the books presented for younger children, where characters can change with time and contain positive and negative attributes. In addition, the writer can move back and forth in time.

Young adult books also present a challenge to Arab authors who would like to interest more sophisticated readers while skirting taboo issues in the Arab World, such as male-female relationships. Around 18% of the books published by the publishers in this study are young adult books. From my experience as a publisher, books for this age group are harder to sell, since older children in the Arab World are less interested in reading books, especially in Arabic. In addition, schools work less with young adult literature in the classrooms and the curriculum becomes more condensed.

I. Others – Table 15

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Number of titles	0	16 Educational toys	Dictionaries Islamic Books	Novels	0	0	88	0	8
percentage of Translation	0%	0%	40%	0%	0%	0%	91%	0%	0%
From Language	/	/	English French	/	/	/	English	/	/

Table 15 shows that some houses publish material that is not necessarily for children, but that they have included under the “other” category. Tala published educational toys for children and school markets, and Dar Alkitab Alloubnani mentioned Islamic books and dictionaries that can be placed under the category of information books for children. Arab Scientific Publishers did not mention the genre of books they included under “others”. After looking at their catalogue, I gathered that Yuki Press’s “others” includes letter games and cards they publish for early readers.

6- Who normally chooses the titles to be published? [Please tick all that apply]

Table 16

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Owner	x	x	x	x	x				x
Partner ie co-owner					x	x	x	x	
Editorial									
Marketing						x			
Author						x			
Production/ Design						x			
Others	Team of employees			Reading committee					

Hashem argues that whatever the size of the publishing house, there are three main tasks that the owner can do alone, share with family members, or divide among different departments. These essential tasks are choosing, producing, and distributing (2010, p. 94).

It is apparent from Table 16 that owners of publishing houses have a large role in choosing titles. Six out of nine publishing houses rely on the owner's opinion. Dar Al Ilm Lilmalayin relied on the partner, marketing personnel, author, and production department for the choice of titles. According to Table 16, partners (co-owners) have a major role in choosing titles in four of the publishing houses that are family businesses of the second and third generations. What is interesting in this table is that editors showed no results at all in the responsibilities for choosing titles. Editor is a position that is rarely filled or known in the Arab publishing industry, where the editor role is often filled by the publisher, author, or owner. Unlike in the UK, where the marketing team plays a major role in choosing titles to be published, Lebanese publishers take very small consideration of the marketing opinion in the choice of the titles. Hashem argues that "choosing" is the most important role that a publisher can perform to build a reputation in the educated and cultured community (2010, p. 95). Lebanese children's book owners and co-owners take the role of choosing either since it is the traditional way of doing the business, since they have small teams to count on, they do not have editors in the companies, or since it is a role that they would like to be in charge of due to its importance.

Part Two

The Market for Children's Books

There are more than 320 million Arabic-speakers in the world, spread throughout the Arab countries and other parts of the world. Arabic is the official language of the Quran, and since the majority of Arabs are Muslims, this is one of the main reasons the parents teach the language to their children. The market for Arabic children's books can be wide, and publishers focus more marketing efforts towards some countries than others. Hashem notes that while both Egypt and Lebanon are leaders in publishing in the Arab World, houses in the former country concentrate on distributing their books outside Lebanon while Egyptian publishers focus on the domestic market (2010, p. 21). The situation is different for children's books because of the nature of markets and the high concentration of Lebanese children's book sales in the Gulf (discussed in detail in the section below and Chapter Three). The publishers were asked to rank the markets where they put in marketing effort. The markets below will be discussed by country, starting with the local Lebanese market, moving to the rest of the Middle East, the Gulf States, North Africa, and Europe. America has not been discussed since none of the publishers in the questionnaire included it as an "others" choice. As a publisher we take part, for instance, in the Paris Book Fair in a collective stand organized by the Ministry of Culture for selling books but not anywhere in the United States.

7- To which states do you think you are putting the most marketing efforts? In Column A, please rank with 1 being the most. Please provide in Column B percentages of total sales, for example, 20% in Lebanon, 15% in UAE, etc.)

A- Lebanon –Table 17

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rate	1	1	No Answer (NA)	NA	NA	NA	14	4	1
percentage of total sales	42%	60%	Part of 50% (they all add up to 50%)	70%	4%	20%	12.48%	25%	70%

The results in the table above again show differing percentages among publishers in the Lebanese market. It is apparent from this table that the smaller Lebanese houses concentrate on the local market more than their larger rivals. Tala, Dar Al-Adab, and Yuki Press, with fewer than five employees and under fifty children's titles a year, sell more than 60% of their output in the domestic market. One of the main reasons behind concentrating on the local market is the fact that the publishing houses' small or non-existent marketing teams have minimal abilities to be present in most of the Arab book fairs. Bigger publishing houses, like Arab Scientific Publishers and Al Maaref, have more marketing team members (and owners) who can travel for up to two weeks to sell to the public and follow up with distributors.

The results from the table above also highlight the importance of the Lebanese market and especially schools in promoting reading. Another interesting observation is that both Tala and Yuki publish children's books only, while Dar Al-Adab publishes adult books. Dar Al-Adab is considered a small children's book publishing house, while they are big publishers when it comes to other genres of publishing. Publishers with a large catalogue can accommodate shipping books and paying for stands and travel expenses for book fairs, sometimes even to multiple fairs at the same time. One of the reasons that Dar Al-Adab books are distributed mainly in Lebanon is that the topics the books discuss are usually linked to Lebanese culture and use the Lebanese spoken dialect. In addition, they often fail to adhere to the thematic recommendations of the states that decide on books by committee decree (see Part One above on the Lebanese publishing overview). The Lebanese market is discussed in Chapters One and Chapter Four.

B- Jordan - Table 18

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Rank	8	3	NA	NA	NA	NA	8	10	NA
Percentage of total sales	5%	8%	Part of 50% (they all add up to 50%)	NA	7%	10%	4.33%	10%	6%

Jordan is one of the smaller Arab states, with a population of over 6 million people and a recorded literacy rate of 89.9% (*Jordan Country Review*, 2013). Akram Masoud Haddad (2013) draws our attention to the fact that prices and income rates in Jordan have been affected by the ongoing economic crisis and rise in oil prices. There has been an increase in the number of families living below the absolute poverty line, reaching 26% in 1996. As can be seen from Table 18, few publishers market in Jordan and sales there were less than 10% for all publishers. In my experience at Asala, the Jordanian market is a small one with limited channels controlled by few distributors who are often are publishers themselves. In addition, there are few publishers in Jordan who are working on producing high quality children's books that reach the Arab markets. Hashem notes that the number of publishing houses in Jordan is not large; the Jordanian Publishers' Union counts around 100 publishers as members, print runs rarely go over one thousand titles, and companies pay 16% taxes on importing paper (2010, p. 125). However, the Jordanian market has fewer restrictions on book imports than other Arab countries such as Saudi Arabia, giving Lebanese children's books a chance to enter the market easily if orders were made.

C- Syria - Table 19

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rank	11	0		0	No answer	0	7	8	0
Percentage of total sales	0	0	Part of 50% (they all add up to 50%)	0	4%	0	7.44%	5%	0

Syria is one of the larger Arab countries, with a population of around 22.5 million people in 2010, prior to the ongoing conflict that has displaced millions and made refugees of millions more. Education in Syria is compulsory, with an official literacy rate of 86% (Syria, 2012, p. 1). However, this table is doubtful, due to the high percentages of poverty, under-developed teaching systems, and the current hostilities. Syrians have low purchasing power, which makes Lebanese children's books expensive, and several publishing houses in Syria publish large lists of children's books at very low prices. Syria has been in crisis since 2011, forcing many people to leave the country and denying many children access to school. Lebanese publishers before the war had minimal sales in the Syrian market, and the current situation rendered these even less significant.

D- UAE - Table 20

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rank	2	2	NA	0	NA	NA	5	2	NA
Percentage of total sales	20%	20%	Part of 50% (they all add up to 50%)	0	50%	20%	9.08%	40%	15%

The seven UAE emirates (Abu Dhabi, Ajman, Dubai, Fujairah, Ras Al Khaimah, Sharjah, and Umm Al Quwain) have a combined population of around 5.3 million people, and the UAE is a prosperous country with political stability. The results of our research verify the importance of the UAE market and the high sales shares that Lebanese publishers have there. The UAE market will be discussed in detail in Chapter Three.

E- Bahrain – Table 21

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rank	6	0	NA	0	NA	0	17	11	0
Percentage of total sales	5%	0	Part of 50% (they all add up to 50%)	0	4%	0	0.76%	5%	0

Bahrain is a very small Arab country with a population of 1.2 million, including 200,000 non-nationals. Education is free in Bahrain but not compulsory, and literacy rates are around 90% (*Profile*, 2012, p. 2). However, the political situation has been unstable lately and according to the *Country Intelligence Report*, “growth will remain below potential while unrest persists” (2012, p. 1). The purchasing power of Bahrainis is not high, and is less than that of other Gulf countries’ citizens. The market is not a focus for Lebanese publishers, and all of the publishers in this study record less than 5% of their sales in the country. Based on our experience as publishers, while the Bahraini Ministry of Culture and Education rarely buys from our house, there are some schools that have high disposable incomes and do spend on books.

F- KSA - Table 22

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rank	3	5	NA	0	1	1	1	1	NA
Percentage of total sales	10%	4%	Part of 50% (they all add up to 50%)	0	25%	35%	20.30%	40%	2%

The Kingdom of Saudi Arabia (KSA) is one of the major markets for Lebanese publishers for many reasons. Saudi Arabia has a population of 26.6 million people with around 85% literacy rate (*Saudi Arabia Country Profile*, 2013). Some of the KSA's current strengths are the fact that it is a stable country with continuity of policies and very high oil revenues (*Pestle Analysis*, 2010, pp. 12-29). According to the Saudi Arabia Country Profile on 1 July 2013, the government gave 37% of its 2013 budget to education and healthcare. The government of Saudi Arabia has been developing its educational systems by working on several educational goals including constructing, renovating and developing both existing and new schools. While Saudis have some of the highest individual purchasing power in the Arab World, the country has strict controls over the books entering the market. Usually the simple topics discussed in children's books are easily allowed into the country, but ideas that question religion are forbidden. The Saudi Arabian market is tempting to publishers, with new opportunities for development. It is apparent that bigger publishers with different lines of publishing chose the KSA market as number one, highlighting its importance to publishers with well-established market networks for sales. This was discussed previously in Chapter One, to make clear that publishers have different lines of specialization since sales are highly affected by personal relationships in the Arab World and satisfying the distributors' needs is important to publishers.

G- Oman - Table 23

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rate	4	NA	NA	NA	NA	NA	6	5	NA
Percentage of total sales	5%		Part of 50% (they all add up to 50%)	NA	5%	5%	8.47%	15%	NA

Oman has a population of 2.6 million people with a literacy rate of around 81%, and education in state schools is free to all citizens (*Profile*, 2007, pp. 1-2). While Oman does not have massive oil reserves like the other Gulf States, Omanis have a strong purchasing power according to the World Bank (list in Appendix C). However, this is not highly reflected in book sales, which might be due to the small population with a very traditional outlook. Many of the publishers in the study sell primarily through the Muscat International Book Fair. The Omani market will be discussed in detail in Chapter Three.

H- Qatar - Table 24

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maare f	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Rate	9	6	NA	0	NA	NA	14	9	NA
Percentage of total sales	5%	3%	Part of 50% (they all add up to 50%)	0	5%	3%	1.22%	10%	NA

Qatar has a population of 1.725 million people and a literacy rate of around 89%. Education in Qatar is compulsory (*People and Culture*, 2012, p. 20). According to the *Qatar Oil and Gas Report* in 2009, Qatar has a massive endowment of natural gas and oil reserves. Having a small population and big returns from oil and gas, Qataris' purchasing power is the highest in the Arab World according to the World Bank list. However, this is not reflected in book buying from the Lebanese publishers in this study, likely due to the small population and the government's slowly-developing book-buying policies (buying during the book fairs, posting lists or tenders). Furthermore, based on my visit to the Ministry of Education, the team there mentioned having their own printed resources that they distribute among schools in Qatar. The Qatari market will be discussed in Chapter Three.

I- Tunisia - Table 25

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Rank	7	0	No answer	0	0	0	11	6	0
percentage of total sales	5%	0	Part of 50% (they all add up to 50%)	0	5%	0	2%	15%	0

J- Algeria - Table 26

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Rank	14	0	No answer	0	0	0	4	3	0
percentage of total sales	1%	0	Part of 50% (they all add up to 50%)	0	0	0	10.68%	35%	0

Tunisia and Algeria are two major Arab countries in North Africa, with populations of 10.5 million people (*Tunisia*, 2011, p. 22) and 33 million people (*Profile*, 2006, p. 1), respectively. Both countries have low purchasing power compared to the Gulf countries and Lebanon. Table 25 and Table 26 demonstrate that Tunisia and Algeria are minimally targeted by most of the publishers. Dar Al Moualef has shown higher sales percentages in both Algeria and Tunisia than all the other publishers. Dar Al Moualef's books are slightly less expensive than most of the publishers, which can give it an easier access to the market. On the other hand, Dar Alkitab Allobnani also sells books at low prices, but appears to put more effort into the Egyptian market. Both Tunisia and Algeria will be discussed in detail in Chapter Four.

K- Libya - Table 27

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rank	0	0	NA	0	0	0	18	14	0
Percentage of total sales	0	0	Part of 50% (they all add up to 50%)	0	5%	0	0.67%	20%	0

Around 90% of Libya's six million people live in around 10% of the country due to the desert landscape (*Libya Country Review*, 2013, p. 205). According to the *Libya Country Review*, while the overall literacy rate is 82.6%, males are at 92.4% literate and females are at 72% (2013, p. 205). The political stability index (where 0 is the lowest level of political stability and 10 is the highest) in Libya had a score of 3.5, while the UAE had a score of 7.5 and the UK one of 9.5, illustrates the high levels of instability in Libya (*The Libya Country Review*, 2013, pp. 85-91). According to Dudley, "[a]n executive opinion survey run by the World Economic Forum (WEF), for example, puts most of the region towards the bottom of global league figures when it comes to the quality of education. Out of 144 countries surveyed, Algeria is ranked in 131st place, Egypt in 139th and Libya in 142nd. Morocco is best-placed at 104th (Tunisia and Sudan are not covered by the survey)" (2013). The data above reflect the small population, high instability, and low level of educational development that are the main factors inhibiting the Libyan market and making it a difficult one for Lebanese publishers. In addition, there are no clear signs of improvement and development in the short term.

L- Morocco - Table 29

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rank	15	0	No answer	0	0	0	19	12	0
Percentage of total sales	0	0	Part of 50% (they all add up to 50%)	0	5%	0	0.40%	5%	0

Morocco is a North African country with a population of around 34 million people, a literacy rate of 51.7, and compulsory education to the age of fifteen (*Background Notes on Countries of the World: Morocco*, 2007, p. 2). According to *Background Notes on Countries of the World*, “the country's literacy rate reveals sharp gaps in education, both in terms of gender and location; while country-wide literacy rates are estimated at 39% among women and 64% among men, the female literacy rate in rural areas is only 10%” (2007, p. 3). According to World Bank, Morocco is placed in the lowest ten countries in the Arab World in the individual purchasing power with US \$5,060 in 2012 compared to US \$14,160 for Lebanon in 2012 and US \$41,550 for the UAE in 2011 (Appendix C). From the data above it is clear that literacy, education, and the economy play a major role in shaping the weak Moroccan book market. None of the surveyed Lebanese publishers tallied more than 5% of their sales there.

M- Egypt - Table 28

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rank	10	NA	NA	NA	NA	NA	15	7	NA
Percentage of total sales	3%	NA	50%	NA	5%	NA	1.22%	5%	2%

Egypt has a population of more than 85 million people, making it the most populous Arab country (*Egypt Country Profile*, 2013, p. 12). While this huge population might seem at first glance very tempting for publishers, there are many factors affecting book sales in Egypt. First of all, based on the information discussed in the Introduction and Literature Review, Egypt has a large publishing industry, which to a certain extent satisfies the domestic market. Second, while the Egyptian economy is highly dependent on tourism,

the political turmoil since 2011 has taken a heavy toll on this sector. The country's rank declined by 10 places in the Travel and Tourism Competitiveness Report (TTI). In the 2013 TTI, Egypt secured 85th position out of 140 countries down from 75th position in 2011 due to the continuing unrest. Safety and security are important to attract tourists and Egypt dropped to 140th position on this indicator. (*Egypt Country Profile*, 2013, p. 3)

A joint report by the United Nations World Food Programme, the government's Central Agency for Public Mobilization and Statistics, and the International Food Policy Research Institute pointed out in May 2013 that 17% of the Egyptian population suffers from food insecurity, and that between 2009 and 2011 15% of the Egyptian population fell into poverty (*Egypt Country Profile*, 2013, p. 3). Third, according to the Egypt Country Profile, "book piracy also continues to affect the development of the publishing industry in the country" (2013, pp. 3-4). Book piracy is a major concern for Arab publishers, making the country less tempting for Lebanese firms to target. Fourth, the literacy rate in Egypt is around 58% of the adult population, despite education being compulsory from ages of six to fifteen and free up to and including university (*Background Notes on Countries of the World: Egypt*, 2008, pp. 2-5). The factors listed above make the market less tempting for Lebanese publishers to target, with the exception of Dar Alkitab Alloubnani, which has a branch there.

N- Yemen – Table 30

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rank	0	0	No answer	0	0	0	13	13	0
Percentage of total sales	0	0	Part of 50% (they all add up to 50%)	0	3%	0	1.38%	2%	0

Yemen has a population of around 23 million people and an unemployment rate as high as 40% (*Yemen Country Review*, 2012, pp. 1-2). The country's overall literacy rate is 62%, and school attendance for boys is 85% at the primary levels and 49% at the secondary level, compared to 62% for girls at the primary level and 26% at the secondary levels (*Background Notes on Countries of the World: Yemen*, 2012, p. 2). According to the *Yemen Country Profile*, Yemen's economy is heavily dependent on the small amounts of oil it produces, making it one of the poorest countries in the Middle East, a situation "compound[ed] by rapid population growth, poor infrastructure, and weak institutional capacities" (2012, p. 1). In addition, "Yemen has been dealing with one of the most difficult transitions from dictatorship to democracy of any country in the region... Instability and violence are continual problems in Yemen" (*MEED: Middle East Economic Digest*, 2013, pp. 18-19). Yemen has rarely been targeted by Lebanese publishers due to the educational, economic, and political situations in the country.

O- Europe - Table 31

	Asala	Tala	Dar Alkitab Alloubnani	Dar Al Adab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Al Moualef	Yuki Press
Rank	13	20	No answer	0	0	0	10	15	No answer
Percentage of total sales	1%	5%	Part of 50% (they all add up to 50%)	0	0	0	2.48%	2%	2%

Professor Bichara Khader (2010) estimated that the number of Arab immigrants in Europe or Europeans of Arab origin to be around 6 million in 2010, which will double or even triple by 2030. As shown in Table 31, very few Arab publishers market to Europe, and those that do rank the continent as outside their top ten markets. This is due to many reasons, including the fact that “Arab immigrants are concentrated at the bottom of the social ladder in terms of jobs and wages” (Khader, 2010). In addition, marketing to a much dispersed constituency with uncertain results is still unappealing to Lebanese publishers. There are currently few distributors in Europe working on importing Arabic books, and they usually concentrate on Islamic books.

P- Others specify- Table 32

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Rank	NA	NA	NA	NA	NA	NA	Kuwait 9 Palestine 12 Sudan 16 Iraq 3	NA	NA
Percent age of total sales	NA	NA	NA	NA	8% Kuwait	NA	Kuwait 2.61% Palestine 1.40% Sudan 1.08% Iraq 12%	NA	NA

Kuwait, Palestine, Sudan, and Iraq are states that were only included by Arab Scientific Publishers in the questionnaire responses. The small children's book publishers in this study such as Tala, Dar Al- Adab, and Yui Press mainly concentrate their efforts in the local market due to their limited capacities and the topics of the books they publish. In addition, Palestine is off limits to Lebanese because of Israeli's closure of borders and rules against importing Lebanese books. In our experience as a publisher, sales in Palestine are done through Jordanian distributors. Iraq has been politically unstable for the past decade, making it difficult and unsafe for publishers to visit. Kuwait, a Gulf State, will be discussed in detail in Chapter Three where book fair customer research has been carried out.

8- What is your best-selling title or series? - Table 33

Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Letters in Stories Series	Friends series	International concepts, science, technology, nature picture information books / Dr Sabr Demradish stories	Boy from Beirut series	Animals Tell Their Stories series (10 titles)	Book Club graded reading series	“Why?” series	English Phrases / My Small Dictionary with Pictures series	AB AB

Publishers’ bestselling titles can provide a general perspective of what sells well in the Arab World, highlighting the preferences of different customers. Asala’s “Letters in Stories Series” are, as their name suggests, single stories in which one letter is highlighted and used in different locations in the word, making it easy for the reader to locate. The series is closely linked to learning and used by schools and parents to support the child’s education. Similarly, Yuki Press’ “AB AB” series teaches letters to children through simple sentences. Information books are very popular in the Arab World, with Dar Al-Kitab Al-Loubnani, Al-Maaref, Arab Scientific Publishers, and Dar-al-Moualef counting them as their top series. Tala and Dar Al-Adab’s bestselling series are a collection of stories that discuss situations experienced by different children. Dar Al Ilm Lilmalayin is well known for its progressive graded reading series. Letters series, information books, stories, and graded reading series are greatly used by schools mainly since they support school curricula, highlighting the importance of schools as major children’s book customers. The bestselling series (by publishers) support the view that children’s books linked to learning and schools sell very well in the Arab World.

9- Why do you think it sells the most? - Table 34

Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayi n	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Topic/ Price	Topics discussed	They won international awards	Kids love them	Format/ Low price	Turnover based on amount of titles	International series/ well developed/ published in tens of languages	English Phrases (5000 a year printed) / My Small Dictionary with Pictures series (quantity sold in 6 months)	Unique/ Simple/ Attractive/ Well priced

Publishers analyse the reasons behind sales of books based on sales figures, their opinions, and personal experiences. Topic, price, awards, format, number of titles, and the way the book is developed are the main reasons that publishers think helped the books and series sell well in the Arab World. Later in Chapter Five, customers' views about the reasons behind buying books will be analysed and compared to those of publishers. Most of the time, the sales of the bestselling series affected the publishers' future lists. For instance, Dar Al Ilm confirmed by phone that they worked on adding titles to the graded reading series books and devoted considerable space in national and international book fair stands to the series. Al Maaref emphasized the role of price and format in its publications, as most of its list is reasonably low-priced compared to other publishers, and features many co-editions with novelty formats. In my experience as a publisher, Asala's letter series opened the door for publishing more titles about letters either in activities, simpler letter books, a single book with all the letters, and a DVD with animated songs about letters. High sales of specific titles or series in the Arab World can shape the publishing houses' future lists.

10- What is your initial print run? - Table 35

Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
3,000	3,000	In Malaysia we print millions	2,000	Between 2,000 and 3,000	3,000	Between 2,000 and 10,000	3,000	2,000

Hashem points out that the average print run in Lebanon is 2,000 copies, except for novels by famous authors and special interest books, where numbers can rise as high as 3,000 to 5,000 (2010, p. 120). Most publishers consider 3,000 copies in their print runs. When calculating the cost of printing, 3,000 copies can help reduce the price of the book compared to a smaller run. However, 5,000 or more copies can be difficult to sell through. The 3,000 initial print run in the Arab World highlights the slow and developing market, which the potential customer base of 320 million Arabs suggests should be higher. Dar Alkitab Alloubnani claims to sell millions of some titles in Malaysia, either to the government or other sources that I have not been able to identify. Due to the competitive nature of business, it was difficult to obtain this information.

11- How long does it need to sell that quantity (approximate number of years or months)?
Table 36

Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
5 years	2 years	3 years	1 years	Between 1 and 3	Between 3 and 5	2 years	Good book maximum 12 months	2 years

The number of years in print is an important indicator of success for a firm's list. The author and the publisher are two main players in the sales of books. Well-known authors like J.K. Rowling start selling titles even before they are printed, through orders from distributors and bookshops. Sales teams in the UK can sometimes secure high sales and base the print-run on pre-orders. In the Arab World, sales are made once the book is printed and not before, due to the way the team is assembled and the channels to which publishers sell, mainly book fairs and schools. Piracy and trust are two important issues in the Arab publishing industry. I think that this lack of trust contributes to publishers' reluctance to market using book dummies before printing. Well-established publishers in the Arab World have already created relationships with bookshops, and maintain a presence in international and national book fairs, thus securing higher sales of new titles than smaller companies with less presence. With the exceptions of Tala and Yuki Press, the publishers in this study (and most of those not included) have entered the publishing industry through family businesses with established warehousing systems of their own. This reduces the need for urgent sales of books to lower high warehousing expenses.

Part Three

Marketing Techniques

12- What are your best-selling channels? (Please rank, with 1 being the most important)

Table 37

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Book Fairs	1		x	x	x	3	3	2	1
Govermental Institutions	2		x			2	5	1	
Distributors	5		x		x	4	2	3	
School reading lists	3	1				1	7	6	
School book fairs	4	2	x			5	6	5	
Bookshops	6		x			6	1	4	
Online sales						7	4	7	
Others specify									Direct sales

Every title has a special personality and needs to be marketed according to its special characteristics, so that it does not disappear among the thousands of available books (Hashem, 2010, p. 104). Marketing and sales in the Arab World are different from many parts of the world, particularly the UK. This is due to the fact that publishers put a lot of effort to sell direct, due to the weak distribution channels in the Arab World discussed in the Literature Review. Wischenbart and Jarrous emphasise the role of Arab book fairs in informing the reader of new titles, since “[b]ook fairs obviously have a particularly low barrier of entry and offer a social experience, almost like a family picnic” (2012, p. 22). In the questionnaires, many publishers simply marked their best-selling channels with an “X”, without ranking them. Book fairs are a main selling channel for publishers, which Table 37 confirms, since most of the publishers (except Tala) selected this option. Like many smaller publishers with few employees, Tala Establishment only participates in international book fairs through distributors’ or in other publishers’ stands. School book fairs in Lebanon and some Arab countries are also important sales channels for many publishers; six out of nine publishers included in the table above sell through the events scheduled by schools. Distributors in the Arab countries are also important to many publishers despite the sector’s relative underdevelopment, and six out of nine publishers

gave distributors a ranking between two and five, a medium importance. It can be seen from the data in Table 37 that online sales in the Arab World are still slow, and when chosen they are ranked low.

There is a significant positive correlation between the number of titles produced by publishers and the sales channels, where the bigger the lists the publishers have, the more diverse sales channels they use to sell children's books. This also supports the fact that most of the publishers are family-based businesses producing genres in addition to children's books and have already established distribution and sales channels. Al-Maaref's novelty books sell well in book fairs and through distributors due to the nature of the books and the publisher's marketing strategy. Dar Al-Adab's books are Lebanese in both the setting and the expressions used in the language, sometimes limiting their appeal in other Arab countries through distributors, schools, or government orders. Tala Establishment and Yuki Press are smaller publishers with few employees and titles, making marketing and sales more difficult for them.

It is worth noting that even though many publishers chose book fairs, governmental institutions, and school reading lists as the top three choices, the rest of the choices are not exactly the same among publishers highlighting the differences between publishers.

13- Which marketing strategies do you use? (Please rank, with 1 as the most effective)

Table 38

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
School Visits	2	1	x		x	x		1	x
Bookshop Windows				x	x			6	
Public libraries visits			x						
Articles in Newspapers						x		2	x
TV							x	7	x
Radio								8	
Emphasizin g titles in the catalogue								5	
Promotions on books (special discounts)	4				x	1		4	
E-marketing									x
Free samples to schools	3		x		x	x		3	
Facebook	X							9	x
Twitter								10	x
Others, specify	1 samples to ministries and distributors - book signing events								Choose special locations for books for example bakeries

Publishers use different marketing techniques to promote their books. As discussed in the literature review and earlier in this chapter, the Arab World's distribution problems, low sales of books compared to the population, and piracy problems all affect marketing efforts and their limited budgets. Hashem points out that due to the high costs of marketing when

compared to the few titles published, publishers usually limit marketing to informing distributors and booksellers about the new lists (2010, p. 104). Strong evidence of the importance of schools was found when looking at Table 38. Eight publishers choose school visits as one of their main marketing techniques, while five firms market their books by giving free samples to schools. Only three publishers market their books using bookshop windows, and one publisher ranked the technique in the sixth position, indicating the technique's low importance. Four out of nine publishers rely on special offers and discounts. From my experience as a publisher, promotions are usually done in book fairs; sometimes higher discounts and offers are given to distributors there.

Table 38 did not show any significant correlation between the size of the publishing house and the marketing techniques used. Some small publishers market their books more variously than their larger rivals, while other small children's book publishers, such as Al Adab, work minimally on marketing and promotion. Three publishers market their books through newspapers, TV, radio, emphasizing titles in the catalogue, e-marketing, Facebook, and Twitter. Book-related TV programmes in the Arab World are rare, and when found are shown at times when viewers are at their fewest (Hashem, 2010, p. 107). Overall, these results indicate that there is a high need to study the effects of the marketing techniques which will be discussed in Chapter Six. Hashem argues that while international publishers market books through catalogues, online, emails, book reviews through cultural groups and journalists, authors' signings, TV shows, and best sellers' book campaigns, such marketing methods are rarely seen in the Arab World due to the limited size of the reading audience (Hashem, 2010, pp. 1-5 and 107). Hashem points out that many Lebanese publishers market books through book-signing events, where a good number of titles are sold, in addition to relying on their relationships with journalists to secure articles where personal relationships play an important role (2010, p. 107). Book signing events are increasingly popular with children's publishers in Lebanon, but are usually limited to picture books or young adult books. However, book-signings events have not been specified by most of the publishers as a successful marketing technique.

14- Why do you think your # 1 strategy in your answer to the previous question is the best? - Table 39

Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
We get big orders / They send teachers to book fairs to buy books /They know about new titles	All marketing techniques complement each other	No best marketing technique: Markets are changing, there are no new available distributors in the Arab World	NA	NA	NA	NA	Marketing cannot be limited to one place, and results cannot be accurately known	Marketing is a combination of many factors depending on the book topic

When asked about the choice of marketing strategy, five publishers out of nine answered the question. The answers in Table 39 are mostly general, highlighting the changing Arab market, the lack of tested experiences to rely on, and the need to experiment with new marketing techniques in Arab countries. One of the reasons behind the general answers could be marketing's common confusion with sales in the Lebanese publishing houses. It is worth noting that most of the sales/marketing personnel in Lebanese firms do not come from a professional marketing or business background. These factors make marketing in the publishing houses untested and account for the continued reliance on personal experiences to market and sell books.

15- In which of the book fairs do you sell the most? (Best selling is 1) – Table 40

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Abu Dhabi	4		2					7	
Irbil			8					8	
Beirut	1		5	x		3	1	6	1
Tunis			7		X			10	
Algeria	8		4					4	
Riyadh	6		3			1	2	1	
Sharjah	3	1	3		X	4		2	
Cairo	7		1					9	
Casablanca			9					11	
Kuwait	5		5		X	5		5	
Muscat	4		6			2		3	
Others specify	2 school book fairs		Tehran						

The Beirut International Book Fair is one of the main book fairs that Lebanese publishers attend, with three publishers selecting it as their top selling fair, and Dar Al- Adab marking it as its only choice (due to their specific topics and themes, as discussed earlier). Five publishers chose the Riyadh Book Fair, which two publishers indicated was their top location, highlighting the importance of KSA market. Only three publishers chose the Cairo Book Fair, with Dar Al-Kitab Al-Loubnani selecting it as its first choice because of their firm's Egyptian branch. There was a significant positive correlation between the size of the publishing house and the book fairs they sell to. The three small Lebanese children's publishing houses, Dar Al-Adab, Tala and Yuki Press, concentrate on one book fair (Beirut and Sharjah). The main obstacle behind the choice of participation in international book fairs is the small teams that tend to work more locally. Taken together, the results in Table 40 highlight the importance of book fairs in the Gulf States.

16 - What is the most influential factor in the sales of the books? (Please rank in order of importance, with 1 as the most influential) – Table 41

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Price	2	2		x	X	2		2	1
Topic	3	1	x	x		1	x	1	2
Hard cover		9	x					6	
Paper quality		6						9	
Small size (less than 17x24)		7						10	
Big size (17x24 and more)		8	x				x	8	
Cover	4		x		X			7	
Title	1	3	x					5	
Author		4	x	x		3		3	
Illustrator		5				4		4	
Others, specify			Direct contact with schools, institutions, and bookshops		New idea and new topic/ attractive illustrations	Trust in book quality/ Publisher's choice of topic			

It is apparent from Table 41 that most of the publishers view “topic” as a very important factor affecting the sales of the books in the Arab World. Al Maaref was the only publisher who did not choose topic as a factor, instead stressing price and cover. This is likely to be explained by Al Maaref’s reputation for publishing many novelty books and picture books that are competitively priced when compared to those of other publishers. Price was chosen by most of the publishers as an important factor, while around half of the companies held that the author and cover played roles, as well. The importance of topic is reflected in the publishers’ catalogues, where many publishers add a “topic” label indicating what the book discusses. In addition, schools mostly buy books based on themes taught in school (since books are used to support what the teacher is working on). In my experience as a publisher, parents and children also ask for books with a special topic in mind, for instance boys ask for joke books or football books. The results from the table above will be compared with the results from the book fair customers in Chapter Five.

17- What are the main obstacles in your business? (Please rank them with 1 as highest obstacle) - Table 42

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Competition		1	x					2	
Distribution	2		x	x	x	1	1	1	1
Finding new authors				x				7	4
Finding new illustrators								6	
Dealing with existing authors								8	
Dealing with existing illustrators								5	
Translation								9	
Discounts			x		x			4	2
Payments	1		x		x			3	3
Others, specify			Control in the Arab World			Non enthusiastic readers and promoting reading			Finding authors with wide imagination especially for young adults

Most publishers viewed distribution as the main obstacle in the publishing industry, confirming the studies done on distribution in the Arab World discussed previously in the Literature Review. Payments were also chosen as a main obstacle, as distributors and bookshops in the region are often late in payments, and sometimes never pay. The lack of rigid rules that help publishers recover their money also influences the publishing business, with debts and payment failures causing some firms to disappear or re-open as new companies. Around half of the publishers chose discounts as a main obstacle, since markdowns to book fairs, bookshops, and distributors sometimes reach 60% in the Arab World. Though UK publishers give up to 60% discount to wholesalers, the latter handle all issues of invoicing, sales, and warehousing. Dealing with authors and illustrators was seen by publishers as a minimal obstacle, reflecting the former's limited role in the marketing and selling process.

Part Four:

The Future

17. What are your future strategies? - Table 43

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Publish more children's books in the same genres, such as:			Exciting / purposeful	Books by Samah Idriss				Etiquette and behaviour books/ classic stories/ activity books/ help books	
New genres of books such as	Biographies		Children's books, behavioural books	Translations	Talking book with internet connection			Electronic/ pop ups/ books with CD	Under consideration and studies
Translate less and work on Arabic books more			x	x		x	x		
Print more of some titles, such as:	Graded readers		stories						
Stop a series, which series, if			Publish single books						
Translate more books			No translations					New cultures/ picture books/ books with new ideas	
Publish e-books	x	x				x	x	Transfer all books to e-books for the reader to have options	x
Others, please specify									

It is apparent from the table above that most of the publishers are considering working on new genres of books. This could be a sign of the changing market, of the need to experiment with new books, or of steep competition within a current market. E-books are a new project that most of the publishers might consider in the future, but their slow development in the Arab World is linked to piracy, slow internet connection, low purchasing power, and the nature of the market itself. Asala's choice of graded readers highlights the importance of series. Only Dar Al-Moualef chose translating books; in my experience as a publisher, many people ask for more non-translated books from the Arab culture. Dar Al-Kitab Al-Loubnani chose behavioural books, due to the Arab cultural emphasis on social behaviour (discussed in the Methodology). Biographies are also a genre of books that is being requested by schools to go hand in hand with the curriculum.

18. Would your publishing house consider using these marketing techniques in the future -
Table 44

	Asala	Tala	Dar Alkitab Alloubnani	Dar Aladab	Al Maaref	Dar Al Ilm Lilmalayin	Arab Scientific Publishers	Dar Almoualef	Yuki Press
Bookshop windows						x			
Articles in Newspapers				x		x	x		
Emphasizin g titles in the catalogue	x		x						
TV								x	
Promotion on books (special discounts)	x	x							
Free samples to schools	x		x			x		x	
E-marketing	x			x	x	x	x	x	x
Facebook	x			x	x	x	x	x	
Twitter	x				x		x		
School visits	x		x			x	x	x	
Others, specify									

Online and social marketing are the most popular methods that most publishers are planning to use in the future. Seven out of nine publishers are planning to work on e-marketing their books, while six publishers intend to use Facebook, and three publishers hope to use Twitter. Five out of nine publishers are planning to continue or begin school visits. It is apparent from Table 44 that Tala and Dar Al Kitab Alloubnani are not planning to market through email or through social media, since the former is one of the small publishers that works minimally on marketing, and the latter concentrates on selling and marketing in Egypt. Few publishers are considering bookshop windows, TV, or newspaper articles. As discussed before, few children's publishers sell through bookshops, while TV, radio, and newspapers have minimal effect. Book programmes on TV or radio are often broadcast at times when there are few viewers, and the book advertisements are seldom on

the newspaper's front pages. In addition, TV, radio, and newspapers are highly costly marketing methods, especially for good spots and screening times.

Conclusion

The Lebanese children's publishing landscape is influenced by a series of variables that are linked to specific publishing houses, the political and economic environment in the Arab World, and the local, domestic, and regional markets. These factors highlight the characteristics of publishing in Lebanon specifically and the Arab World in general. If we return to Schein's (1992) analysis of how organizational structures operate under three levels (visible information, espoused values including the mission statements, and the underlying assumptions) (Saunders et al., 2000, p. 86), discussed in the Methodology, the questionnaires answered by around half of the children's book publishers in Lebanon try to correlate with those three levels.

It is apparent from part one of the questionnaires that the size of the publishing houses, viewed through the total number of employees, employees working in marketing, titles published, print-runs, and specialization, varies widely among publishing houses in Lebanon. For instance, one of the largest publishing houses in Lebanon, Dar Al Ilm Lilmalayin, has up to fifty employees working on the whole list (not only children's books) and published a maximum of thirty-six children's books in 2007, while Al Maaref published three hundred titles in 2010 but has ten employees. Yuki Press has two employees and published six books in 2010. Picture books and reading series are the most popular among publishers, and this strongly reflects the market that concentrates mainly on schools and schoolchildren visiting book fairs.

When looking at the markets for books, each publisher concentrates on and sells to a different sub-market. This study found that there was not one market targeted by every publisher, again highlighting the differences between houses. However, the Gulf States' higher individual purchasing power and political stability have made them more appealing for the Lebanese publishing sector, a tendency that will be likely to expand in the future. The developments are also becoming apparent in the Gulf, where publishing houses such as Kalimat Publishing are opening backed by Bloomsbury in Qatar, or where Arab and Lebanese publishers are establishing partnerships and opening joint ventures such as Arab Scientific Publishers.

Book fairs, distributors, and schools are the most popular outlets for publishers, which influences the marketing techniques used by Lebanese publishers. Many marketing

methods through television and radio, used in the UK and other developed markets, are not used by Lebanese publishers, and when used have minimal effect. Lebanese publishers view “topic” and “price” as the main factors affecting the choice and sales of books, while distribution was viewed as the main obstacle to publishing in the Arab World.

The future of Lebanese publishing lies in the creation of a new series of initiatives, and increased use of e-marketing and social media. It seems that marketing children’s books will continue to advance slowly, and the differences between the Arab and the UK markets are becoming more apparent. Few Arab publishers are considering marketing through TV, promotions, emphasizing books in catalogues, Twitter, or bookshop windows. However, in the future, redirecting marketing towards these means of promotion and dissemination needs to be tested further.

The data deficit in the Arab World, the protracted instability across the region, and the archaic nature of business practice in the region means that the publishing sector will take time to change. Tried and trusted techniques coupled with smaller budgets and risk-averse views of e-marketing and social media means that this change will be slow.

Do publishers have the same ideas in mind as customers?

Is the market well understood by publishers?

The coming chapters will attempt to answer these questions, both through survey results and secondary research, and the results will be compared with views from the children’s’ publishers themselves.

Book Fairs in the Arab World Part 1

The Gulf States

Images from Kuwait International Book Fair

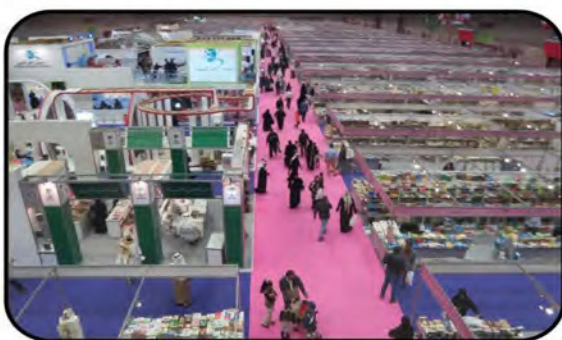


(alkhaleejonline.com, 2015)



(Jeleeb.com, 2013)

Images from Doha International Book Fair



(media.al-sharq.com, 2015)



Images from Muscat International Book Fair



(mctbookfair.gov.om, 2014)



Images from Abu Dhabi International Book Fair



(theriyadhpost.com, 2014)

Images from Sharjah International Book Fair



(Ramzan, 2012)



Introduction

To examine the preferences of children's book customers in the Arab World, a series of questionnaires was presented to book purchasers at book fairs across the region in order to chart purchasing patterns, preferences and behaviour.

This chapter will assess the questionnaire responses from five Gulf State book fairs. The preliminary findings suggest that high sales in the Gulf State book fairs can be attributed in the first instance to strong economies and high per capita incomes for citizens and inhabitants of Gulf States. These broad findings notwithstanding, there are differences in purchasing trends within the Gulf State book markets.

This chapter scrutinises these findings in order to better understand differences within and between the Gulf States' children's book markets. To that end, the book fairs' findings will be described in alphabetical order: Kuwait (Kuwait), Qatar (Doha), Oman (Muscat), and the UAE (Abu Dhabi and Sharjah).

The fact that some book fairs are busier and sell more than other book fairs raises the questions:

What affects book fair sales and success?

Is it the country's economy, stability, individual purchasing power, the book fair's management and promotion, and/or other factors?

The Kuwait International Book Fair, one of the book fairs in the Gulf for Arab and Lebanese publishers, will be discussed in the following section.

Kuwait International Book Fair

Kuwait Information – Table 1

	Population	GNI/year	Libraries	Bookshops	Price of loaf of bread	Price of milk	Basic cost of living(electricity, water, garbage...) of 85sqm apartment
Kuwait	3.4m	\$48,000	27	10-20	\$0.93	\$1.47	\$42.16

Kuwait has a population of one million citizens and 2.4 million non-Kuwaitis, where education is compulsory and free for all citizens (*PROFILE. Background Notes on Countries of the World: Kuwait*, 2011). Kuwait is a rich country with oil making up to approximately 90% of the export revenue, and GNI of US \$48,000 per capita (BBC News, 2015) while the costs of living are average compared to the yearly income rates and to other Arab States.

As a result of publishing regulations in Kuwait, where for instance the “[n]ewspaper publishers must have licences from the Ministry of Information (The ministry censors books, films, periodicals and other imported publications deemed morally offensive)” (BBC News, 2015), book fairs are a hive of activity for publishers and purchasers alike since during book fairs the customers have the opportunity to look at books displayed by international publishers.

Though Kuwait has twenty-seven public libraries, very few people visit them. In her article in *Kuwait Times*, *The Abandonment of Public Libraries*, Fattahova (2014) mentions that there are special sections for children but very few visitors. For instance, “[o]n an average day, Khaldiya library saw only five visitors including this reporter. In Jahra, the public library receives on average only two to three visitors per day. In general, the libraries have separate visiting days, so the Khaldiya library has three days for women and two days for men” (Fattahova, 2014).

Kuwait has few bookshops. According to the *Kuwait Moms Guide (Bookstores libraries*, 2015) there are ten bookshops, while the *Kuwaitiah* online newspaper mentions twenty bookshops and publishers in Kuwait (Kuwaitiah.net, 2015). The book fair provides an opportunity to present new titles and sell them to the public. As a result, more books are bought in the book fair than elsewhere.

On October 20, 2011 the 36th Kuwait International Book Fair opened at the International Pavilion. “Al-Haroun, State Minister for Development, noted in a statement the significance of the participation of several Arab publishing houses and expressed particular pleasure at the children's books pavilion... ‘We in the State of Kuwait are proud to hold this fair, one of the major exhibitions in the Arab world,’ he said, adding that many Arabs travel to Kuwait to attend the annual affair” (*Kuwait Opens Annual Book Fair*, 2011).

518 publishers from twenty-two countries, thirteen of which were from the Arab World, exhibited in the Kuwait International Book Fair 2011. Al-Snafi (2011) observed that “the publishers include[d] 467 private publishing houses, 44 state-owned institutions, and

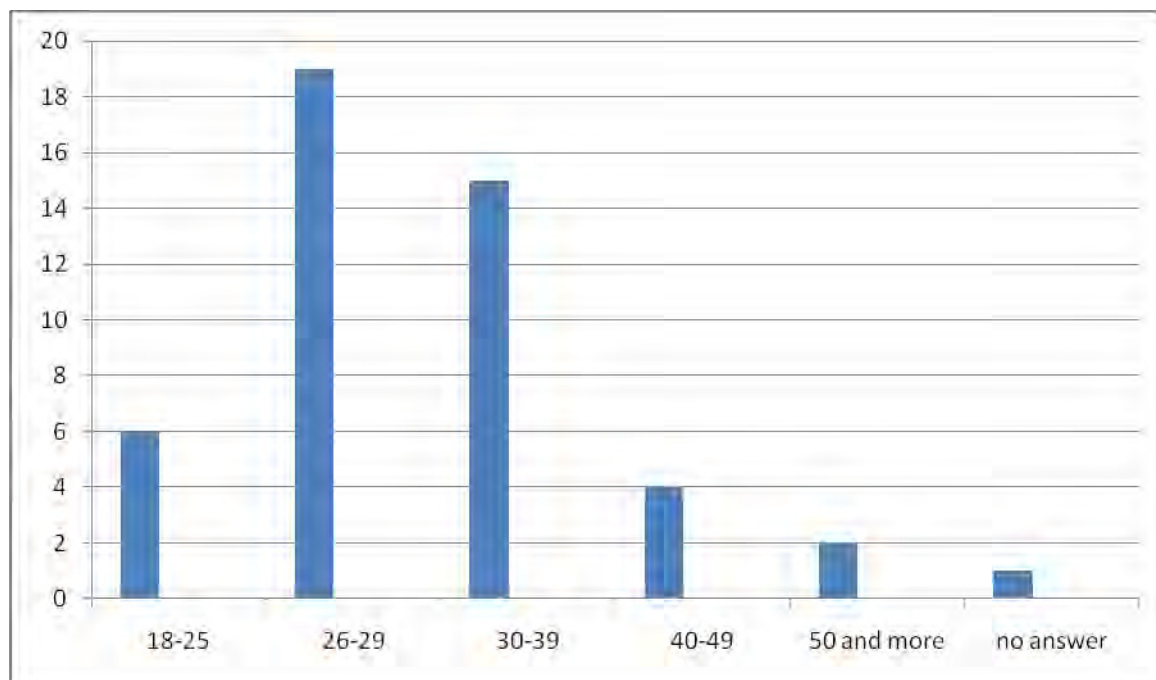
publication departments of seven Arab and international organizations”. Although children’s publishers had their own section, very few of them were able to fit in that hall due to its popularity with the many visiting schoolchildren.

Other visitors included parents and institutional groups like schools. Visits from such large groups do not necessarily result in windfall profits for publishers, since many schools and institutions expect to receive discounts on their invoices, and children often spend their money on food. In addition, the teachers are usually in a hurry since they come with the classes and must supervise the children.

The Experience of Questionnaires

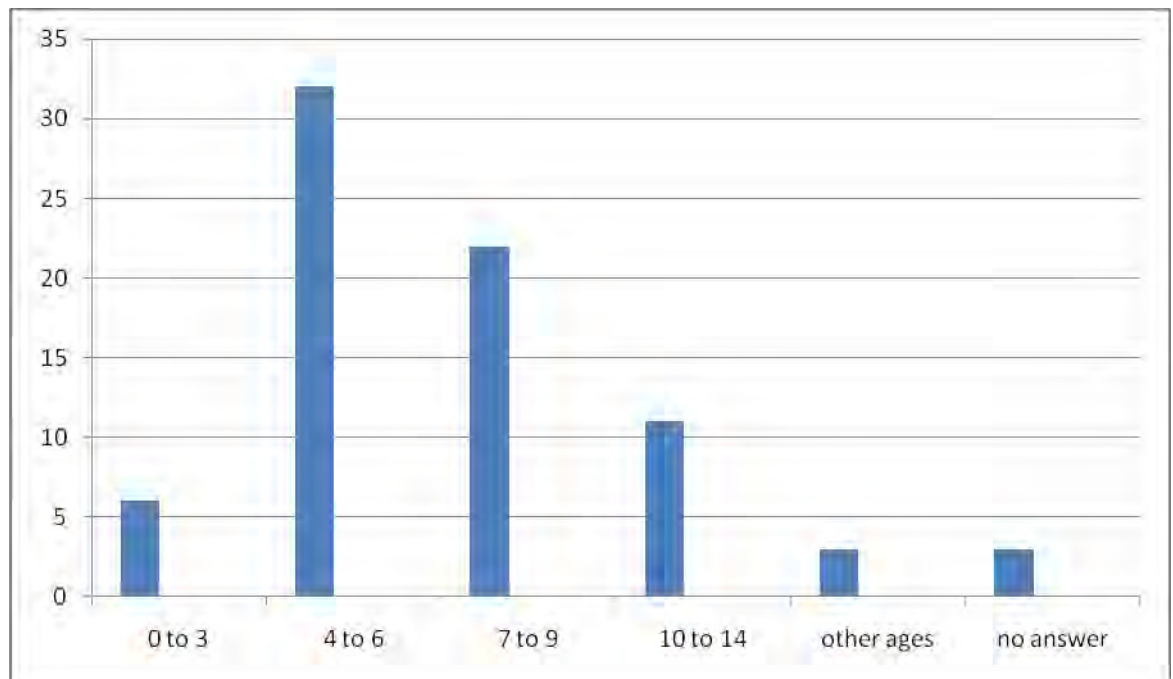
The Kuwait International Book Fair had different numbers of visitors in the different halls. The hall where the Kuwaiti publishers and bookshops displayed was very crowded compared to the other halls. Due to the low number of visitors in the hall where Asala Publishers was displaying, I was able to complete forty-eight questionnaires. However, the people who did visit our section were quite helpful in completing the survey. Some people did not answer personal details such as age, relationship to the children, and children’s age, while they answered most of the other questions.

Kuwait Figure 1: Age of the Adult



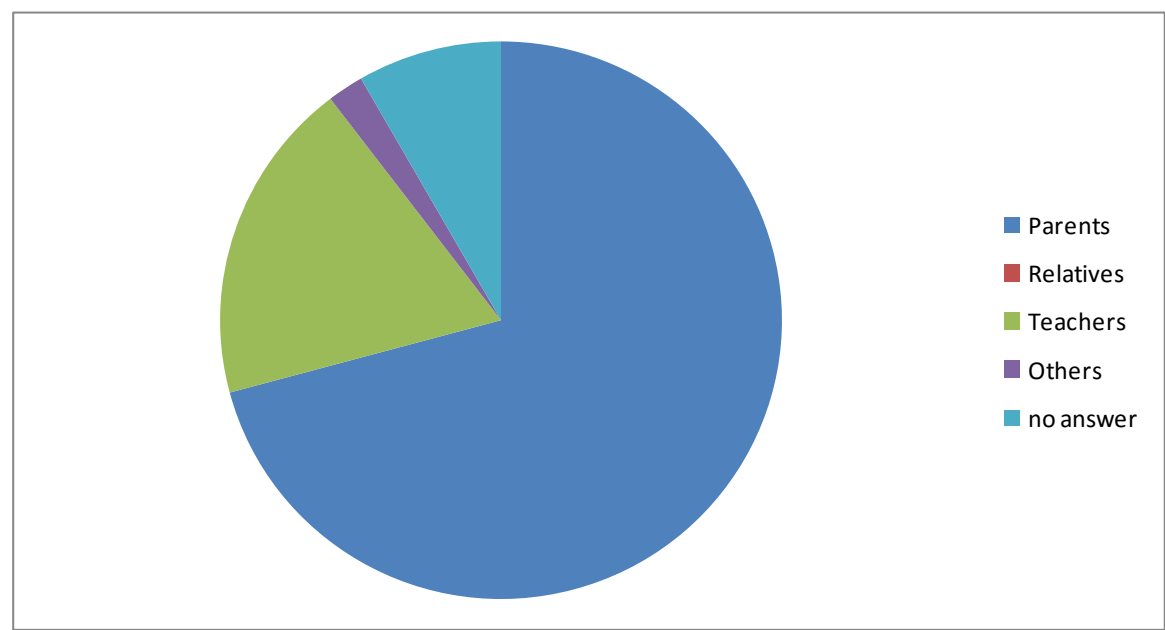
Approximately 73% of the people answering the questionnaire were female and 23% were males. Approximately 40% of the respondents were between the ages of 26 to 29, and 31% were in their thirties, demonstrating the size of the young parents' age group in Kuwait and the minimal role that older age groups have in purchasing children's books.

Kuwait Figure 2: Age of the Children



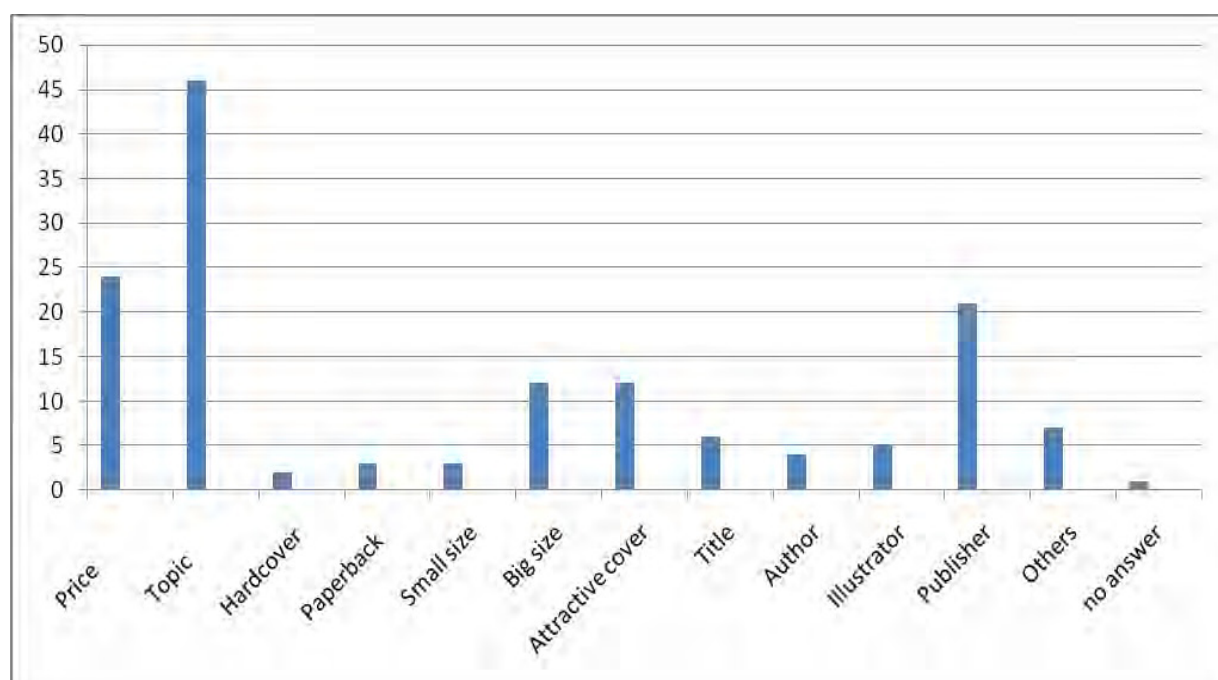
Kuwaiti customers had several kids from several age groups and intended to buy children's books for each of them. The largest percentage of respondents in Kuwait (67%) intended to buy books for children between the ages of 4 to 6, while 45% of the customers wanted to buy books for children between 7 and 9 years old. Finally, 22% were buying for older children, between 10 and 14 years old. These numbers explain the concentration of books published for beginning readers between the ages 4 to 9 and the diminishing attention paid to publishing for older children. Respondents who chose the 'others' section did not specify or write the age group they intended to buy for and left the line empty.

Kuwait Figure 3: Relationship to the Child



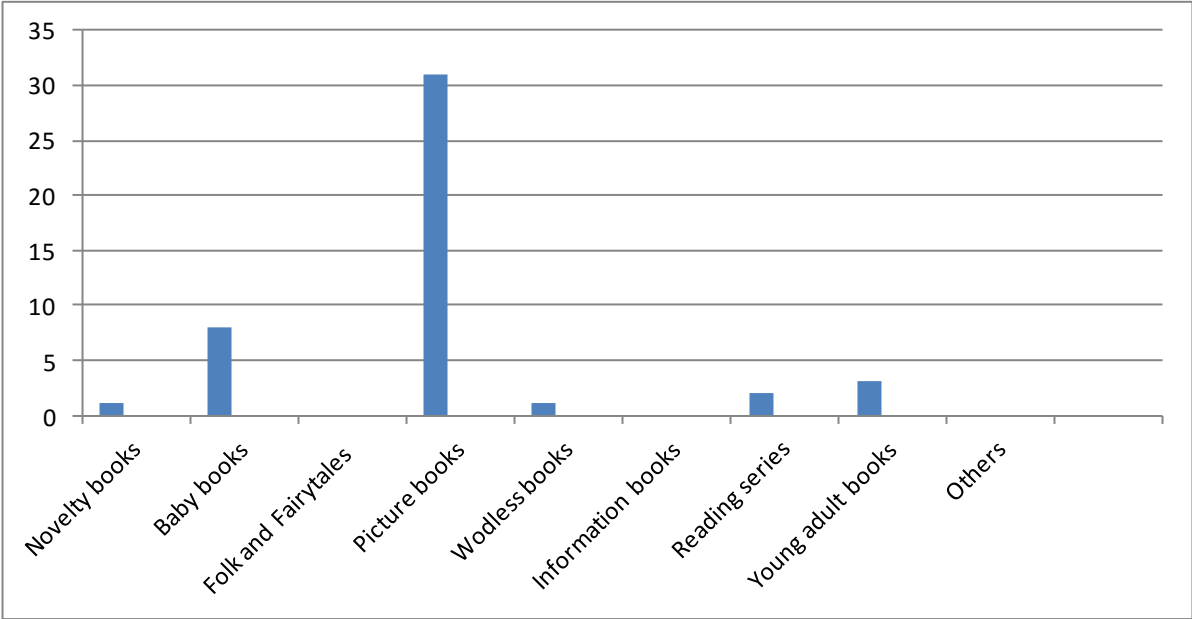
71% of the respondents were parents, while only 19% were school-teachers. The presence of Asala’s stand outside the children’s book hall might have affected the data, since most of the school children come with their teachers to the children’s hall, while parents visit the other sections in the fair. In addition, perhaps the timing of the book fair, in October during the beginning of the school year, might have made it difficult for teachers to visit the fair, since teachers were busy preparing their classes and work. The results were similar to book fairs held in September (Algeria) and October (Sharjah) discussed later in the chapter and Chapter Four. It is worth noting that none of the respondents were relatives (other than parents).

Kuwait Figure 4: Criteria for Buying a Book



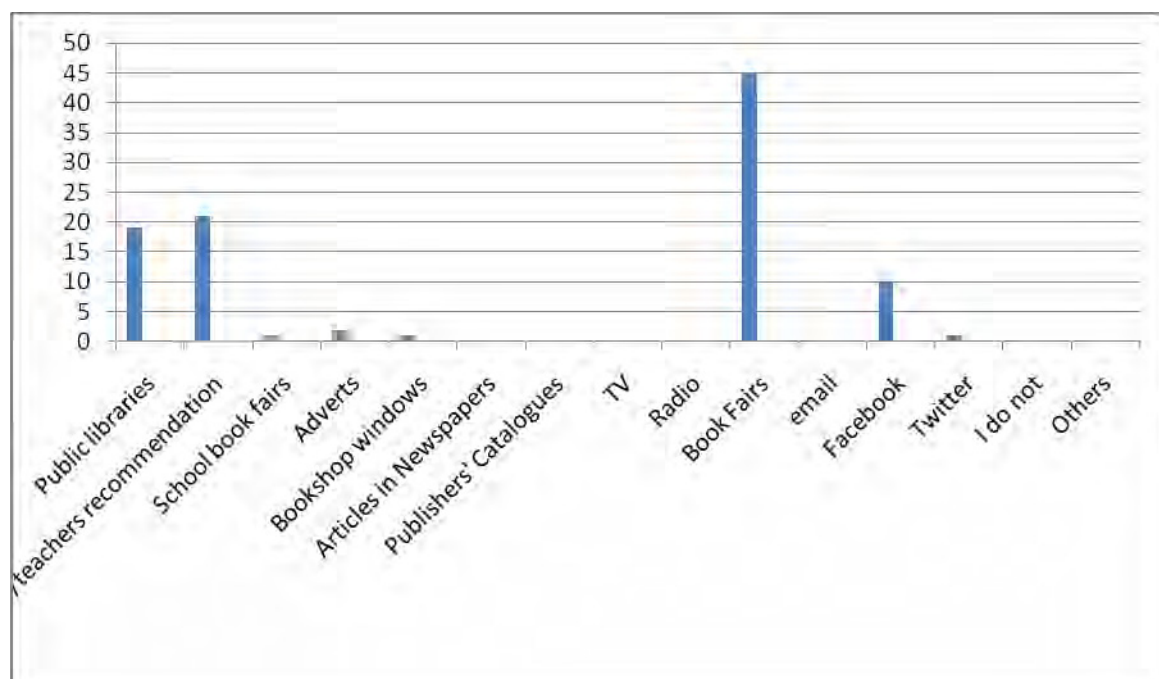
When respondents were asked about the criteria they followed to choose children's books, approximately 96% selected the topic as the main criterion, while 50% indicated the price, and around 44% chose the publisher. Very few respondents chose books based on format, size, author, or illustrator. 14% of the respondents that ticked the "others" category specified non-translated books. The topic (discussed in detail in Chapter Five) is the most important criterion in choosing a book for customers visiting the Kuwait fair. Residents of the Gulf States and especially the Kuwaitis are known for their high disposable incomes, and their selection of price as a key variable might be either because the Kuwaiti respondents do not value Arabic-language children's books as highly as other items they purchase, or because the customers have worries about publishers over-pricing. There has been high demand for non-translated books because of the prominence of books in translation, and the corresponding desire to discuss and deal with Arab-related issues.

Kuwait Figure 5: Kinds of Books



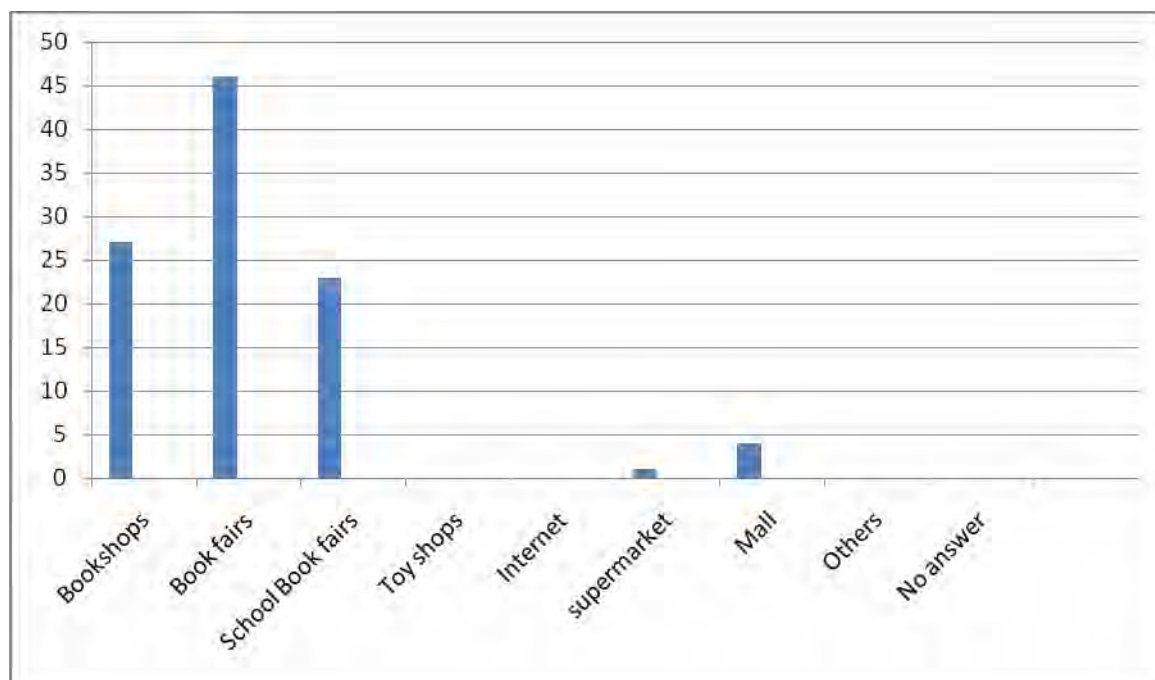
Approximately 65% of the children’s book customers in Kuwait want to buy picture books. The results are reflected in Asala publishers’ highest percentage of sales for picture books for children between the ages of 3 to 9 in Kuwait International Book Fair. Around 17% of customers with children under the age of three chose baby books. Very few customers chose the other categories, highlighting the importance of picture books in the Kuwait market, while a couple of respondents preferred not to answer this question.

Kuwait Figure 6: How Do You Find Out About New Children's Books?



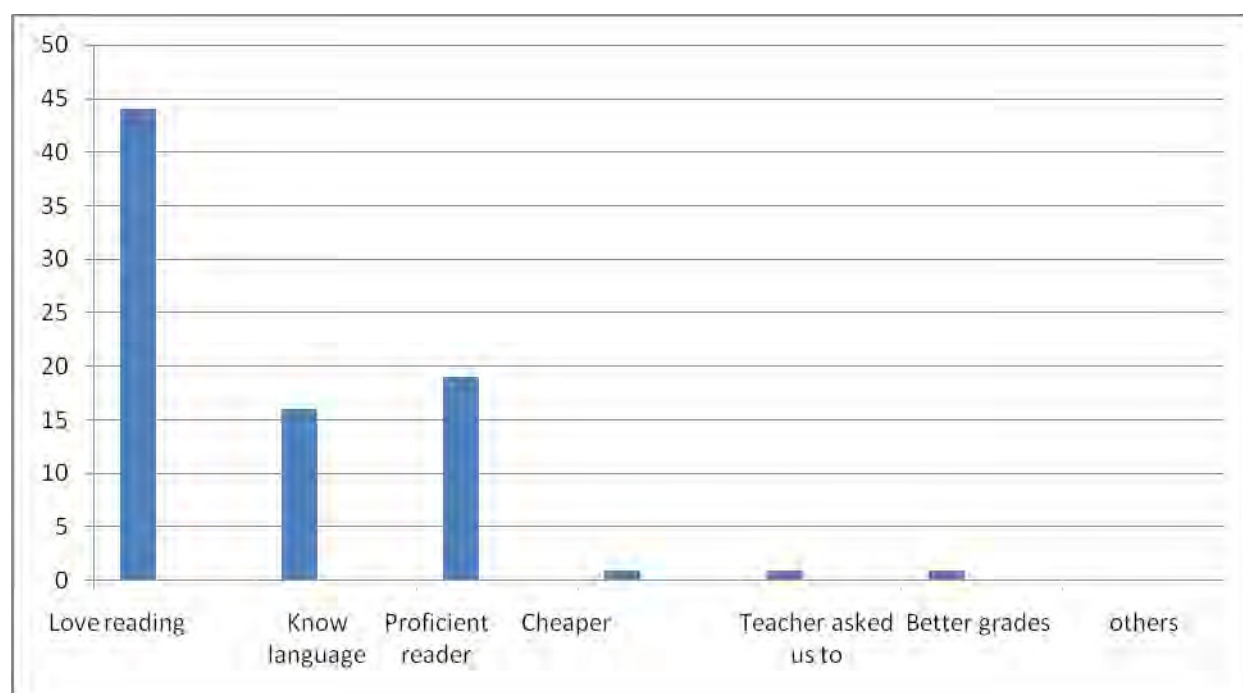
When customers were asked about where they find about new books, respondents chose more than one choice without ranking their choices. 94% of the respondents in Kuwait knew about the latest children's books from book fairs, while approximately 44% heard via teacher or school recommendations, and surprisingly approximately 40% from public libraries (since very few visitors visit public libraries in Kuwait as discussed before). Almost no respondents received book news from the radio, newspapers or emails. This again underscores the high importance of book fairs in the Arab World as a medium for presenting new titles. The fact that there are very few bookshops in Kuwait has affected the results of the questionnaires since only one respondent knew about new titles from bookshop windows. Finally, around 20% of fair patrons had heard about new titles from Facebook, which is an economical way for publishers to reach the public. The few respondents who ranked their choices chose book fairs and teacher/school recommendations, in that order.

Kuwait Figure 7: Where Do You Buy Your Books?



Most respondents (96%) buy their books from book fairs, while around 56% buy from bookshops. The high percentage of customers buying from bookshops emphasises the big role that the few bookshops in Kuwait play in selling books and not presenting new titles. Nearly half of those surveyed, roughly 47%, purchased from school book fairs. School book fairs appear to be increasing in popularity, particularly in the Gulf States and Lebanon. Once again, book fairs are a major sales venue for publishers in the Arab World due to the limited number of bookshops and the small space given to Arabic children's books. None of the people asked buy their books online or from toy shops. According to the MasterCard survey published April 21, 2015, Kuwait was a leader in the percentages of shoppers online in the Middle East for the three months before the article was published. The results have not been reflected in the my study indicating the low interest of children's book customers to buy online, the few websites providing the service, or the regulations that the government has on receiving books by mail. When we gave respondents the option to rank their choices, most of them chose book fairs as the first choice, while school book fairs and bookshops came in second and third places highlighting the important role that book fairs play in Kuwait.

Kuwait Figure 8: Why Do You Buy Arabic Children's Books?



When children's book customers in Kuwait were asked why they buy Arabic children's books, around 92% indicated the promotion of love of reading. Around 40% hoped that these books would help the children become proficient readers, while around 33% wanted their children to know the Arabic language. Only one selected the choice "the teacher asked us to", a sharp contrast to the 44% who indicated that they heard of new titles from teachers or school recommendations. This discrepancy likely means that fair-goers either do not buy the books that the teachers recommend, or set more importance on their top choices in the questionnaire. Survey-takers who ranked their choices chose the "love of reading" as the most important factor followed by knowing the language or becoming a proficient reader.

Conclusion

Kuwait is another flourishing market in the Arab World, with growing opportunities for publishers. The questionnaire results revealed that the typical Kuwaiti customer is a young mother wanting to buy picture books for her elementary school aged children, with an eye towards price and value for her money. She focuses on topic, believes that books help children to love reading, and buys from book fairs. When targeting the Kuwaiti customer, books that have an emphasis on Arab and Islamic traditions might do well due to the country's high percentage (85%) of Muslims. Kuwaitis are few in number but have high purchasing power.

Doha International Book Fair

Introduction

Qatar Information – Table 2

	Population	GNI/year	Libraries	Bookshops	Price of loaf of bread	Price of milk	Basic cost of living(electricity, water, garbage...) of 85sqm apartment
Qatar	1.8m	\$80,470	11	5	\$1.56	\$1.94	\$57.10

Qatar has a population of 1.8 million Qatari people living mainly in Doha, the capital, with a high number of expatriate workers (*MEED: Middle East Economic Digest*, 2012). According to the Human Rights Watch (2013), “Qatar has the highest ratio of non-citizens to citizens in the world, with nationals comprising approximately 12% of the population”. The small native Qatari population tends to respect Islam, the Arabic language, and local traditions. According to the *Qatar Country Review*, Qatar’s is a Bedouin culture with strong tribal ethos “based on poetry and song rather than buildings or art” (*Qatar Country Review*, 2012). Qatar is “generally a conservative Muslim culture where Arabic is closely associated with the Islamic faith; thus, its use reinforces the Islamic identity of the nation and its citizens” (*Qatar Country Review*, 2012).

Qatar is a very rich country with a very small population, making the living standards of Qataris very high: “Qataris’ investment in development and diversification is big by any standards -- even for a country boasting the highest per capita income in the world” (Hart, 2003). Qataris’ costs of living are relatively low compared to their high income while they are higher than most of the other Arab States.

Qatar’s financial status is being used to develop the country, particularly in education. The *Middle East Economic Digest* states that Qatar is spending millions of dollars improving education (MEED, 2012). According to *Qatar Country Profile* education in Qatar is “compulsory and free” for all Arab residents between the ages of six and sixteen, and “about 3.3% of GDP in this country is spent on education” (2014, p. 115). The United Nations Development Program ranked Qatar 38th worldwide in human development,

measured according to three areas: education, longevity, and knowledge (*Qatar Country Profile*, 2014, p. 115).

In addition, Qatar has public libraries which the government is improving. According to the Qatar National Library's (2014) website, Qatar has eleven public libraries in different areas in the country, with print collections ranging between a couple of thousand titles and more than 300,000. As well as public libraries, there are several bookshops in Qatar. According to Angloinfo (The Global Expat Network Doha), there are five bookshops in Qatar selling children's books including the well-known Virgin and Jarir (*Doha Books and Bookshops*, 2014).

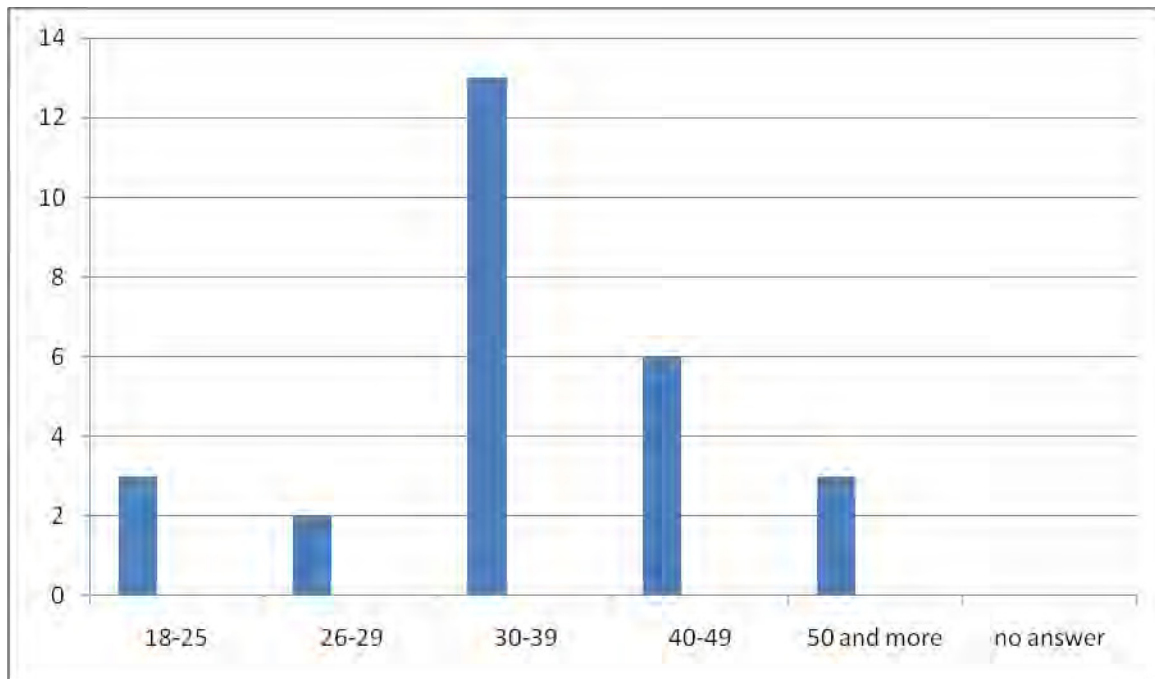
Librarians, booksellers, and teachers visit the Doha International Book Fair to buy books and check on the latest titles. The fair's website stresses that the government has placed culture as the main aim of the book fair, and considers the Doha event as one of the three main book fairs in the Arab World (alongside Kuwait and Sharjah), in terms of quality and standards of participating publishers (*Doha Book Fair*, 2014).

According to fair director Abdulla Alansari, 360 publishing houses from twenty-nine countries exhibited in the fair in 2013, with 100,000 titles, (80,000 Arabic and 20,000 English) and in 2012 the fair had up to 130,000 visitors (Tagholm, 2013). It is worth noting that compared to the population in Qatar, the number of visitors is quite high.

The Experience of Questionnaires

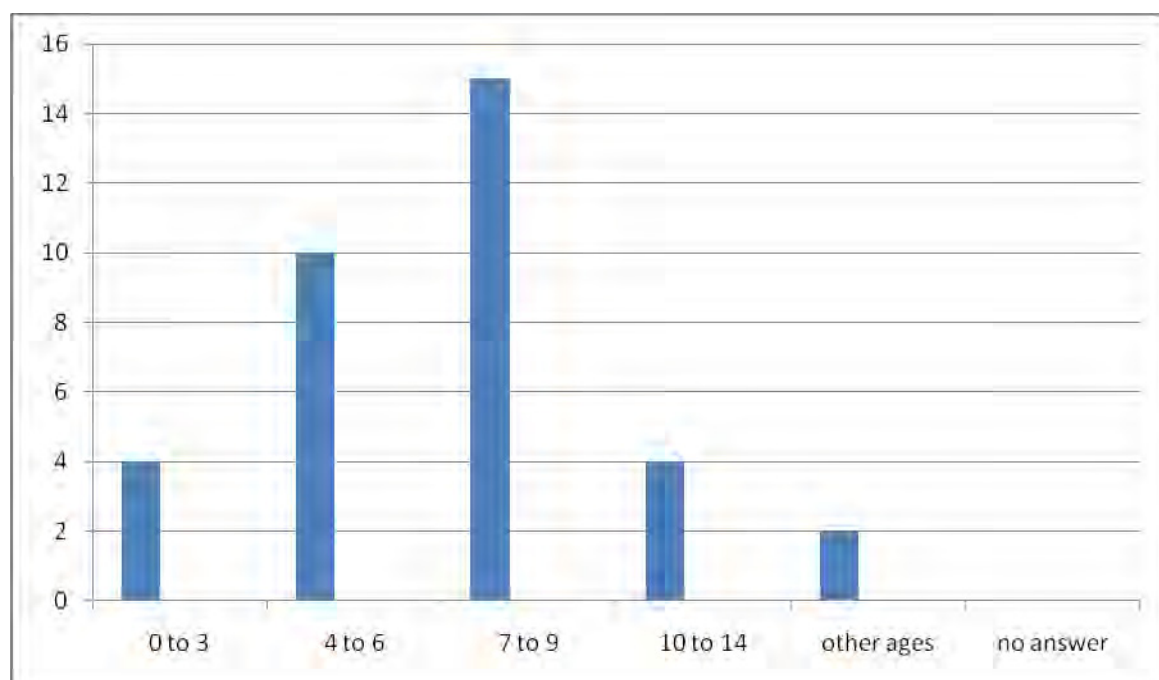
Due to the small population Doha International Book Fair is rarely as busy as comparable fairs in other Gulf cities. The book fair has a three-hour break at lunch time, dividing it into morning and afternoon/evening sections. Schools visit the book fair in the mornings, mainly concentrating on the children's book areas. Many Lebanese publishers have children's books on their lists, in addition to their other adult books, and are placed away from the children's book section. This makes it harder for the Lebanese publishers to reach schoolchildren who visit with their teachers in the morning. The book fair management organized a corner for activities, book-readings, and book-signing events where children can come and enjoy a rich schedule of activities. I was only able to complete twenty-five questionnaires due to the limited number of visitors and the fact that many visitors were busy with their children or did not agree to complete questionnaires. Due to the conservative Islamic culture and the fact that the people passing next to the children's book stands were mainly female, I was able to complete twenty-three questionnaires from female respondents and only two from male respondents.

Doha Figure 1: Age of the Adult



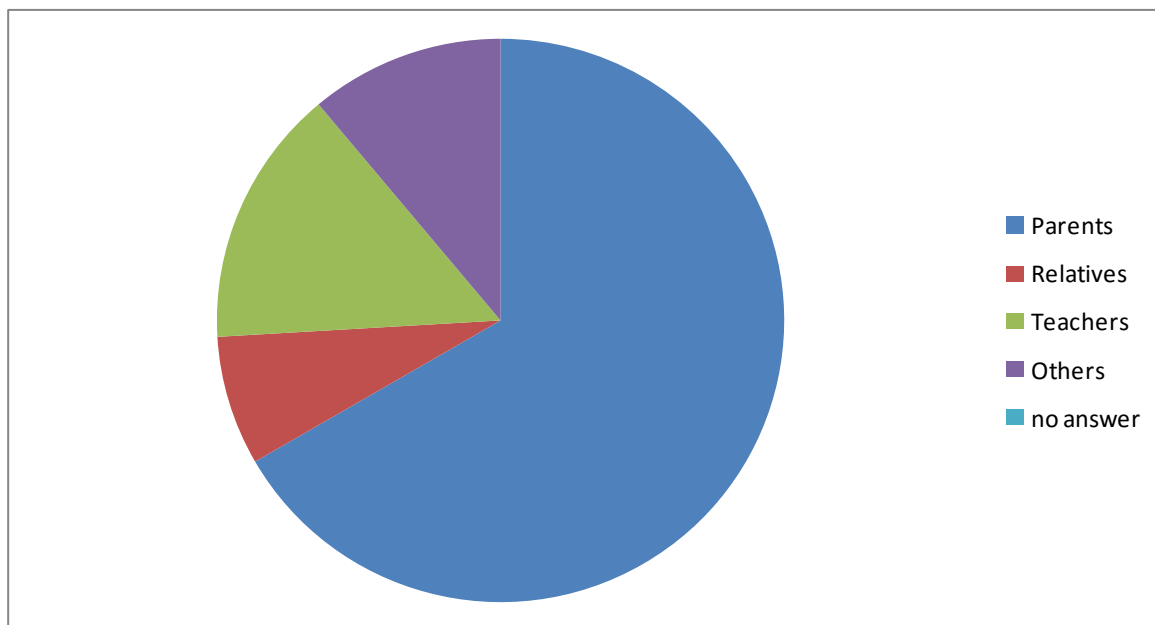
The majority of the respondents, 52%, were between the ages of 30 and 39, 24% of the respondents were in their forties, while fewer respondents were between 18-25, 26 to 29, and over 50 age groups. That many children's book customers are mothers, teachers, or educators over thirty might reflect the purchasing habits of a more mature and experienced customer.

Doha Figure 2: Age of the Children



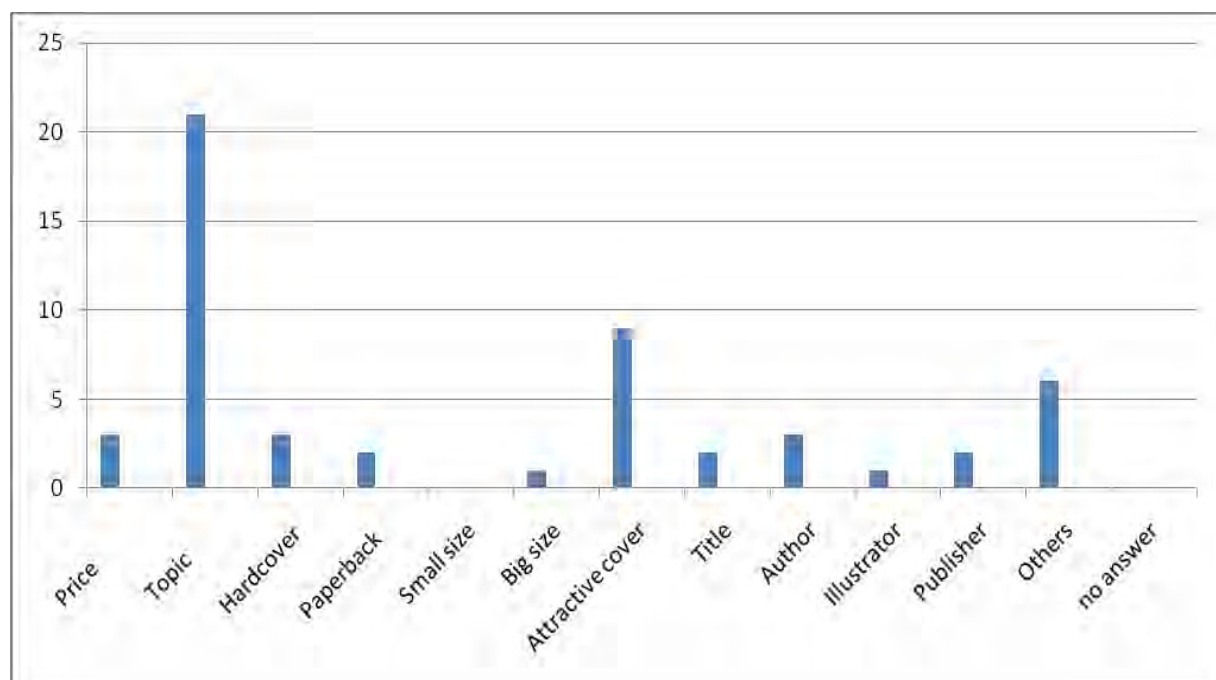
The data in Doha Figure 2 reflects the fact that many customers are purchasing for children of different age groups. 60% of the children's book customers are buying for children of ages 7 to 9, while 40% are buying for children of ages 4 to 6. The data from the figure above also reflects the big percentage of titles published and in demand for elementary schoolchildren (4-6 and 6-9) in the Arab World for the production of books for this age group. Few customers are intending to buy baby books or young adult books. One respondent who selected the "others" option intended to buy books for a seventeen year old.

Doha Figure 3: Relationship to the Child



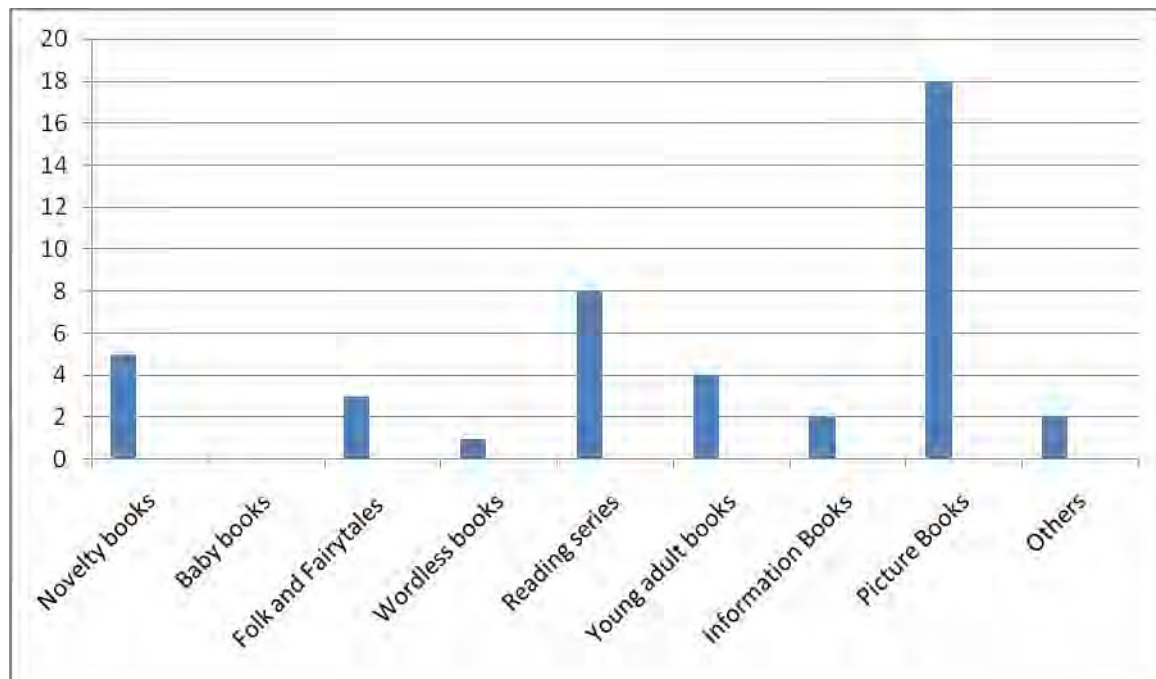
Based on the questionnaire results, the majority of the children's book customer respondents in Doha International Book Fair were parents (72%). 16% were teachers, and 12% who answered "others" were a principal, librarian, and translator/trainer. Very few customers were relatives (other than parents) of the children that they wished to buy for. The results emphasise the important role that mothers play in purchasing children's books in the Qatari market.

Doha Figure 4: Criteria for Buying a Book



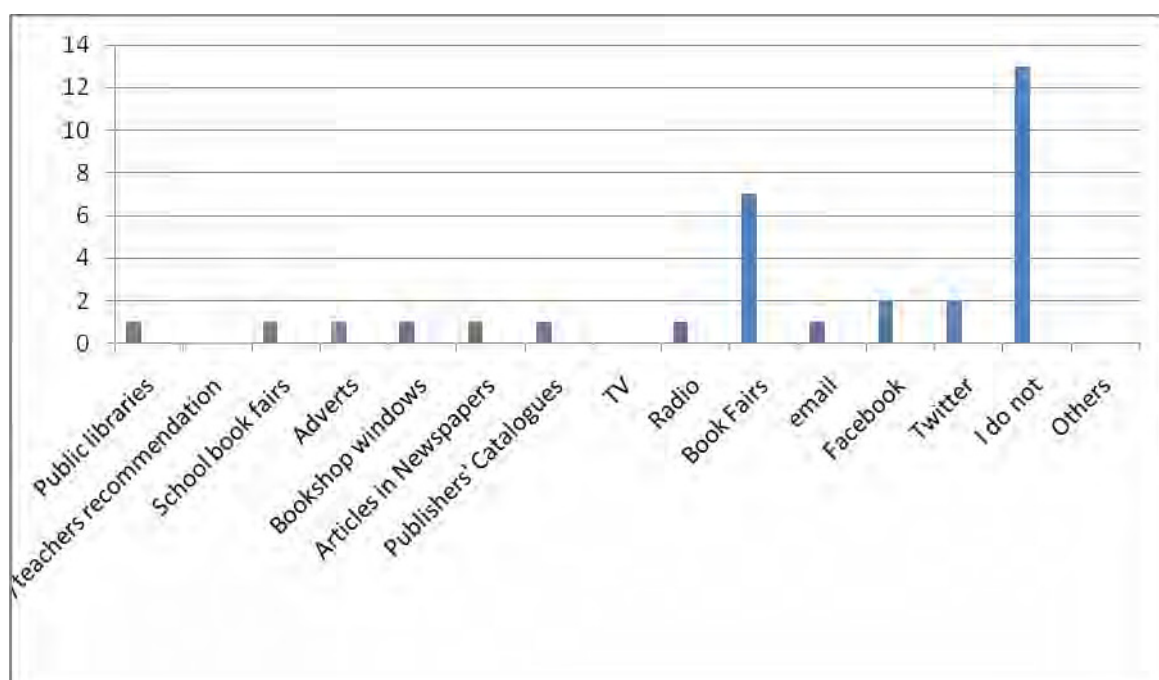
84% of the children's book customers in Doha International Book Fair based their choice on the topic. Approximately 23% of the respondents were affected by the attractive cover as a criterion for purchasing children's books. Very few respondents selected any of the other choices, highlighting the importance of topic to Doha customers. Respondents who chose "others" specified: big illustrations, minimal text, illustrations, medium-sized books, the paper, small words, and appropriate reading level.

Doha Figure 5: Kinds of Books



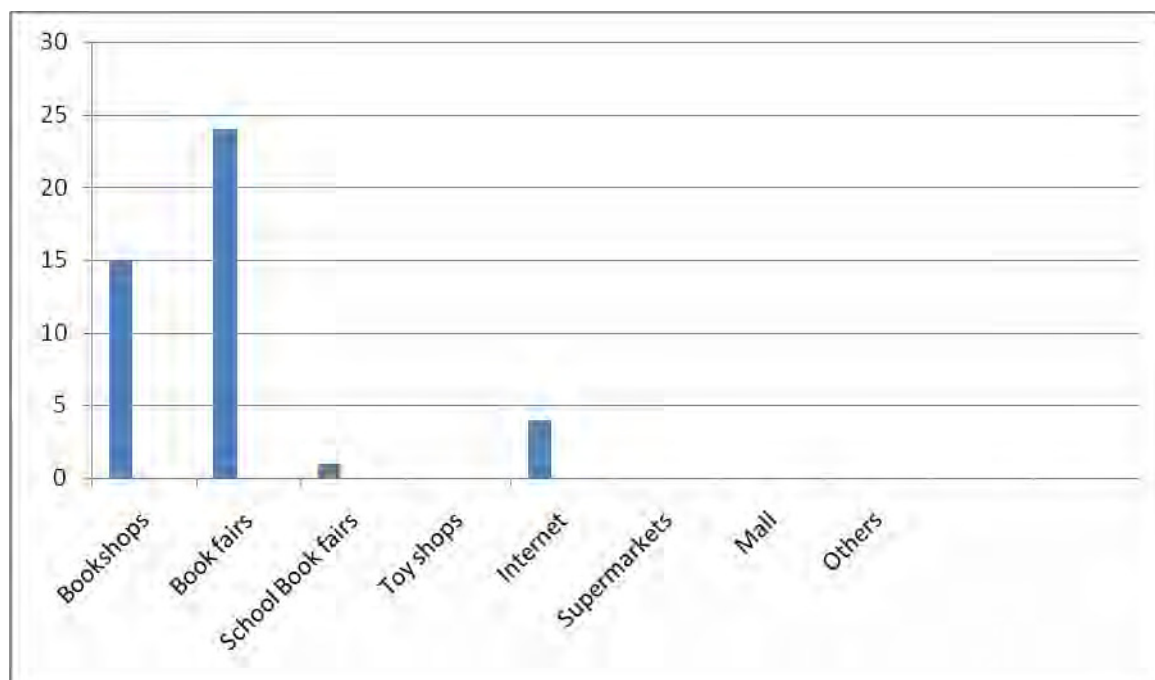
72% of the respondents intended to buy picture books, which is the highest percentage in the Doha questionnaire choices. 32% of the respondents were looking for graded reading series, which are becoming more popular in the Arab World due to their usefulness in helping the child practise reading. The respondents who had children of an age 0 to 3 did not choose baby books, which affected the results of baby books. The other options were chosen by very few respondents, which highlight the importance of picture books for Qatari customers.

Doha Figure 6: How Do You Find Out About the New Children's Books?



52% of the respondents did not find out about new children's books. The percentage is a clear sign of the need to promote new children's books in Qatar. 28% of the customers knew about children's books from book fairs, reflecting the role of book fairs in selling books and promoting new titles. Very few respondents chose the other mediums to find out about new books, giving them a weaker role in the market. Although there are a few public libraries in Qatar, few respondents used them to learn about the new titles. As publishers, we do not receive yearly requests from public libraries in Qatar to know about and purchase new titles.

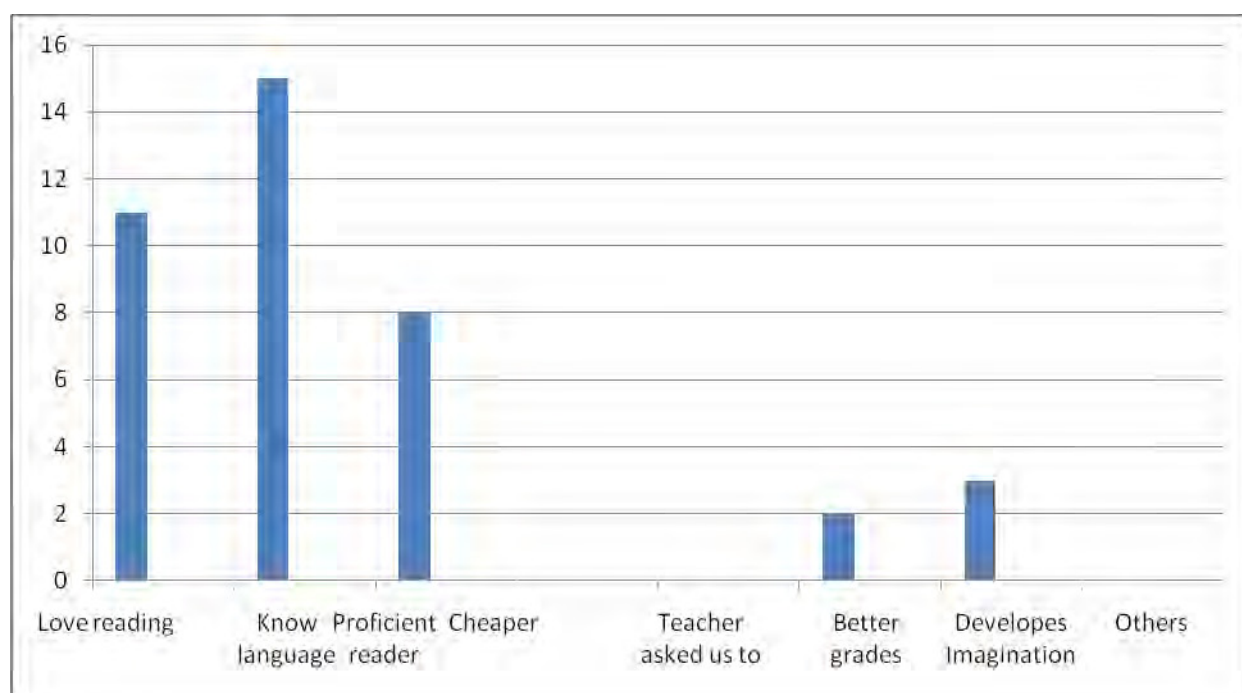
Doha Figure 7: Where Do You Buy Your Books?



The majority of respondents (96%) purchased children's books from the book fair, while 60% purchased books from bookshops, giving both a strong role in book sales in Qatar. It is worth noting that the fact that the respondents were interviewed in book fairs has an effect on the results since the interviews are already administered to book fair customers. Very few or no respondents purchased books from toy shops, malls, supermarkets, and school book fairs. It is worth noting that school book fairs are a new trend in the Arab World, and one that is not common in Qatar.

16% of respondents purchase books online. According to MasterCard's (2014) credit card research, "Qatari consumers were clear about what factors sway their online purchase decisions. Citing the security of payment facility, reputation of website, and convenient payment methods as the most important consideration when making an online purchase.... 45% of online shoppers still purchase products from foreign websites". The MasterCard study highlights the characteristics of the Qatari purchaser who still does not trust online transactions. According to this study, convenience and variety of products are the two most important reasons for purchasing online from local websites (MasterCard, 2014). Even though the title of the website press release is *Online Shopping Witness Growth in Qatar: MasterCard Survey*, it is worth noting that online shopping is still slow. The website mentions that online shopping is spent on travel, airlines and financial advice... almost half of respondents made at least one purchase in 2013 (MasterCard, 2014).

Doha Figure 8: Why Do You Buy Arabic Children's Books?



60% of the respondents wanted to buy children's books to help their children improve their knowledge of the Arabic language, 44% wanted to help their children to love reading, and 32% wanted their children to become better readers. The results highlight the importance of the children's books in promoting the knowledge of the language and reading in Qatar.

Conclusion

Of the world's twenty fastest-growing luxury markets, Qatar sets the pace in this study, while Saudi Arabia is second (Katz, 2014). Although Qatar's population is small, the Qataris have a high purchasing power.

Children's book customers at the Doha International Book Fair are mainly mothers in their thirties wanting to buy books for their elementary school children. Topic is the main criterion, and teaching the Arabic language and promoting reading are the most important reasons for the purchase. The Doha International Book fair plays an important role in promoting new titles and selling books. Many Qatari customers do not know about new children's books and there is a need to research further the effect on sales of promoting children's books in Qatar.

The *Middle East Economic Digest* (2012) stresses the importance of culture and tradition and the important considerations needed before doing business in Qatar, including taking

time exchanging courtesies, and establishing trust before discussing business. “Ultimately, a national's word is considered a bond. Courtesy may inhibit a firm no, but it is rare for a Qatari to back down from an agreement” (*MEED: Middle East Economic Digest*, 2012).

Qatar is a wealthy and developing market in the Arab World, while some other Gulf States are not far from Qatar’s level of development.

While issues of topic take priority in both Qatar and Kuwait, distinctions in purchasing power drive decisions making in book purchases. Nonetheless, in both markets purchases are made primarily by mothers visiting the book fair.

Muscat International Book Fair

Introduction

Oman Information – Table 3

	Population	GNI/year	Libraries	Bookshops	Price of loaf of bread	Price of milk	Basic cost of living(electricity, water, garbage...) of 85sqm apartment
Oman	3m	\$25,320	--	--	\$1.15	\$1.68	\$61.25

The population of Oman is less than three million, living mainly in Muscat, the capital, and on the Batinah coastal plain (*Oman Country Review*, 2011). Omanis' yearly income is average when compared to the other Arab States with a relatively average to high cost of living when compared to other states. Many Lebanese and Arab children's book publishers take part in the annual Muscat International Book Fair, for several main reasons.

Since 1970, the Omani government gave a priority to education since it is a "vital factor in the country's economic and social progress", where "[e]ducation is virtually universal in the mostly state-run primary sector" (*Oman Country Review*, 2011). The government's strategy is reflected in the book purchase process, especially before and after the Muscat Book Fair. As publishers, we receive a request from the Omani Ministry of Education to send samples of our new titles during a specific time of the year, with detailed information about each book. Based on the samples, the committee chooses the books to be purchased during the book fair, reaching once around 1,600 copies of each Asala title in 2013. It is worth noting that the books purchased in high quantities were the low-priced titles. In addition, the books Asala Publishers sent as samples to the Omani Ministry of Education are reviewed, and schools are encouraged to make purchases during the book fair.

Oman's cultural sector is still developing, with few bookshops and public libraries around the country. Najma al Zidjali, a mother living in Oman, was in Washington with her five-years old child, visiting many "bookstores, public libraries, parks, festivals, activities, music, arts and crafts exhibits, and many other fun open-ended possibilities. It's a city where children can take advantage of unending possibilities!" and she expresses her worries that the "lack of such facilities in Oman are alarming..." (AL Zidajly, 2012).

In the *Times of Oman*, Elham Pourmohammadi (2014) expresses her worries about public libraries, stating that “[d]espite continued efforts to promote a culture of reading in Oman, Muscat has few reference libraries and no public library that can lend out books, much to the disappointment of avid readers and researchers”. The *Times of Oman* interviewed Othman Al Mujaini, director for libraries' affairs at Diwan of Royal Court, where Mujaini talked about the special section in the library dedicated to children where they plan “creative activities and competitions” (Pourmohammadi, 2012). According to the Oman Public Library website, “[t]he majority of the books are textbooks and range in intellectual level from school to university. There are also general encyclopaedias, language dictionaries and atlases” (*Public Knowledge Library*, 2014). Omanis find that the scarcity of public libraries in Oman is an issue that needs to be rectified. The presence of books in different outlets is not very common in Oman, making the capital's book fair more important.

The Muscat International Book Fair is one of the most important cultural events in Oman. Faizul Haque notes that around 800,000 people visited the Fair in 2014, remarking that the bestselling title was the *Omani Encyclopaedia*, which sold around 4,000 copies (*Times of Oman*, 2014). The bestselling titles in a book fair can say something about the customers, and Oman is working on promoting education where books are greatly related to education and knowledge. Al Riyami remarks that “[t]his fair relates to the importance of books, as they are a great scientific and cultural source of learning. Books impart knowledge to humanity because they contain the ideas and achievements of great writers and thinkers” (Al Riyami, 2012). The *Muscat Daily.com* published an online article to introduce the book fair to the public, mentioning that “[s]tudents have been allotted separate timings for exclusive visits. Male students can get exclusive access on February 27, March 3 and 5 from 10am to 3pm, the days for girl students are March 2, 4 and March 6 (10am to 3pm)” (Muscat Daily Staff Writer, 2014). The book fair timing schedule separating male and female student visitors reflects the conservative nature of the Omani culture. In the afternoon and evenings the public is mixed (males and females).

Yousuf Al Bulushi, the director of the book fair, told the *Omani Times* that in 2014 the Muscat event had more visitors and participating publishing houses than in previous years. According to Al Bulushi “[t]here were 570 publishing houses from twenty-five countries, which was a significant increase over last year's figures when 476 publishers had turned up for the event. Japan and Brunei participated for the first time in the book fair. There was a total of around 160,000 titles present in the exhibition” (Haque, 2014). The number of visitors, publishers, and titles reflect the Muscat International Book Fair's growth, and its

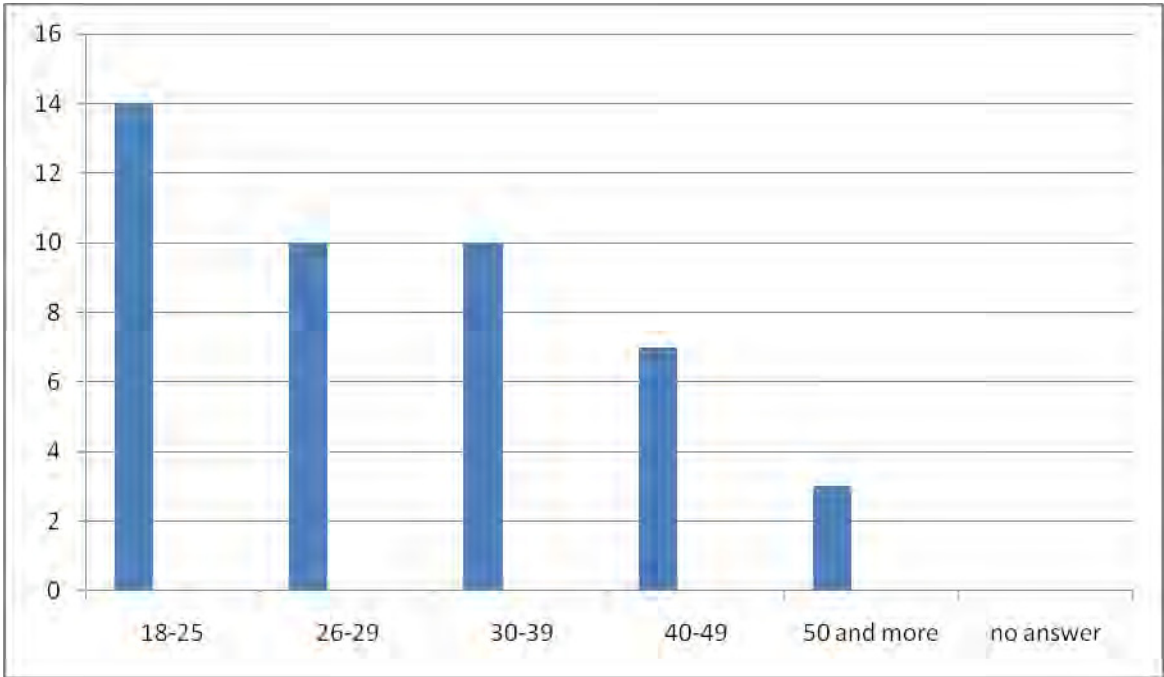
increasing importance for Lebanese and Arab publishers, especially due to the government support in purchasing books.

Asala Publishers participates in the Muscat International Book Fair, which is an opportunity to sell and meet new customers and network with older customers.

The Experience of Questionnaires

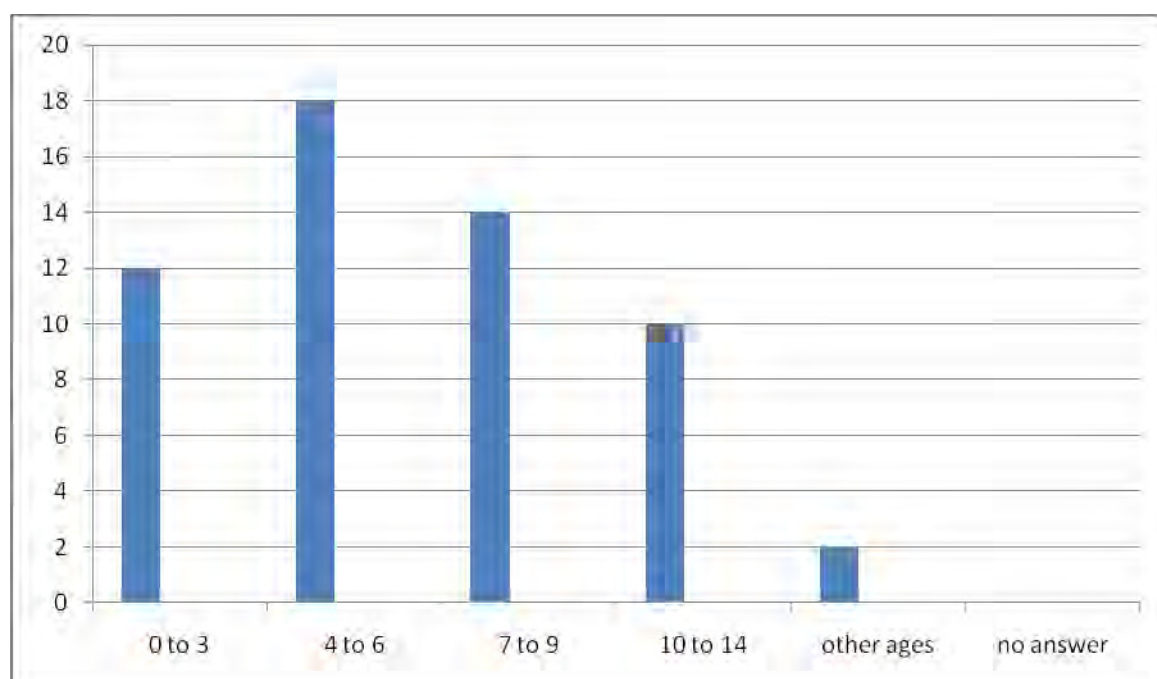
The experience of completing questionnaires in the Muscat International Book Fair was difficult, since few people were open to answering the survey. I was able to receive forty-five completed questionnaires in Muscat, of which thirty were female respondents and fifteen male. Most of the customers passing by the children's book stands were women, since women are the main caregivers in the Arab World. It was also difficult to get male visitors to complete the questionnaire since fewer passed by our stand and I was a woman myself, while the women who passed by were busy buying the books or taking care of their children, making it challenging for them to answer.

Muscat Figure 1: Age of the Adult



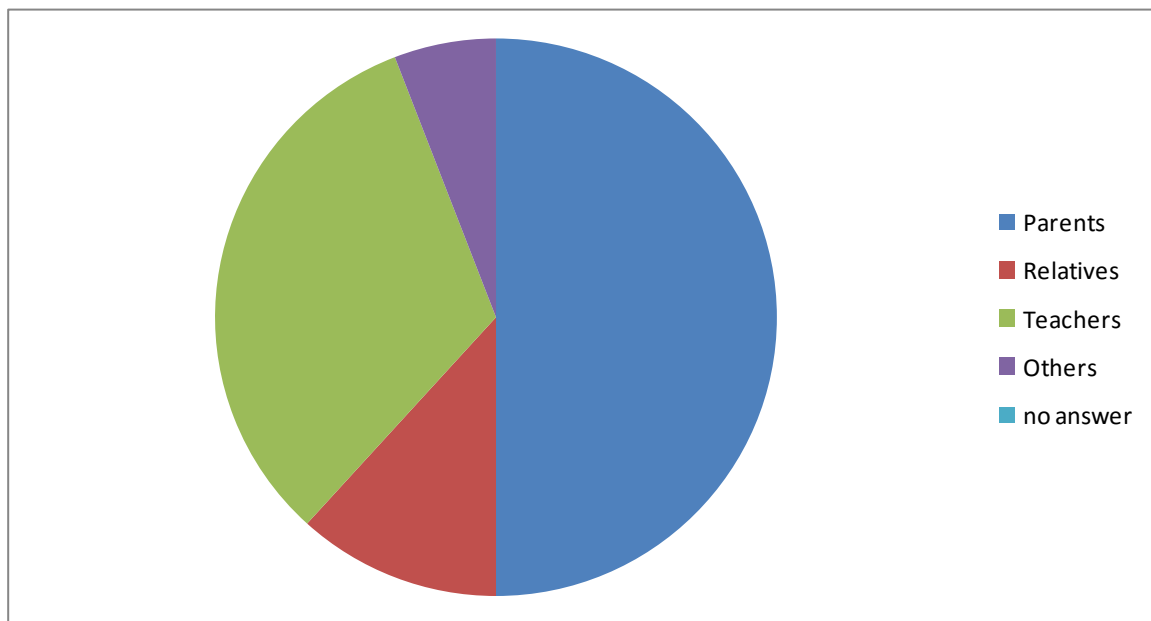
The respondents in the Muscat International Book Fair were widely divided between the different age group sections, reflecting the interest in children’s books by customers from widely different age groups with a majority of young customers. Few people older than fifty answered our questionnaire, which can be the result of fewer people in that age group (usually grandparents) visiting the book fair to purchase children’s books.

Muscat Figure 2: Age of the Children



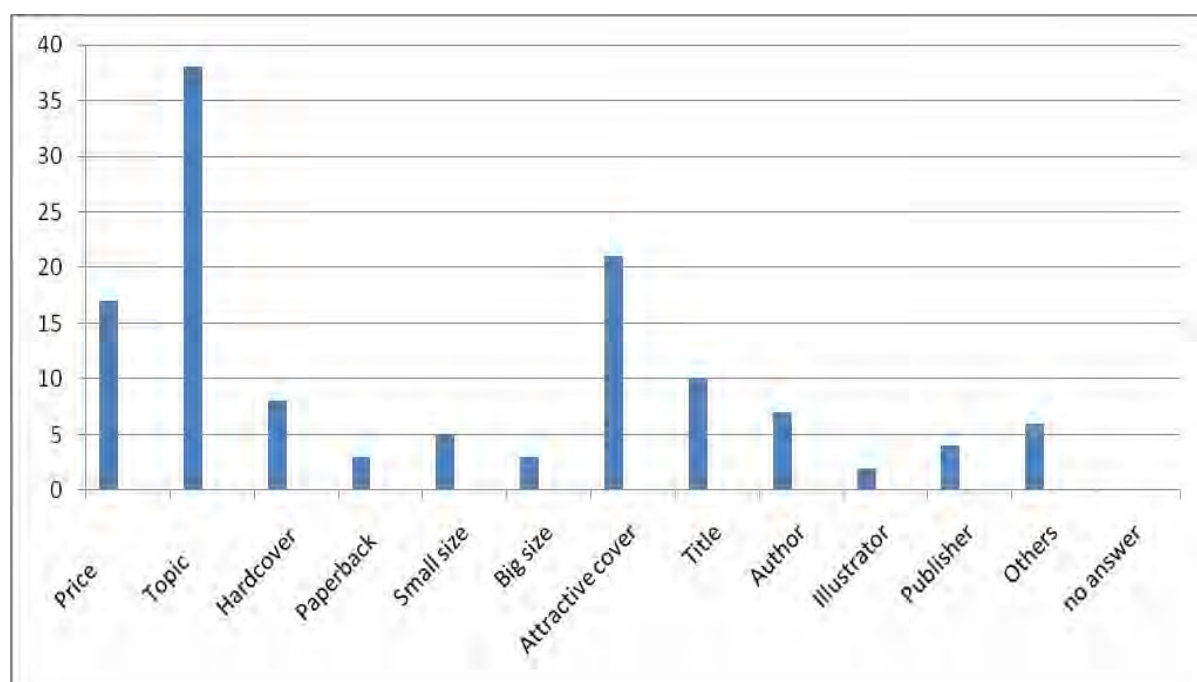
The largest percentage of visitors bought books for children between the ages of 4 to 6 (40%) and 7 to 9 (31%). It is apparent from Muscat Figure 2 that many customers bought for multiple children from different age groups. Approximately 27% of the customers were buying baby books, 22% were buying books for children between the age of 10 to 14, and two respondents were buying books for young adults of ages 16 and 17, which the respondents specified in the “others” choice. According to the *Oman Country report*, the population of Oman has been growing rapidly, with more than 40% of the population under fifteen years old (2006). These numbers distinguish Oman from other Arab countries, where there is a variety of responses in the ages of the children. The high percentage of customers with children in the 4 to 6 and 7 to 9 age groups highlights the large number of books published for these age groups and the low number of publications for baby books, ages 0 to 3.

Muscat Figure 3: Relationship to the Child



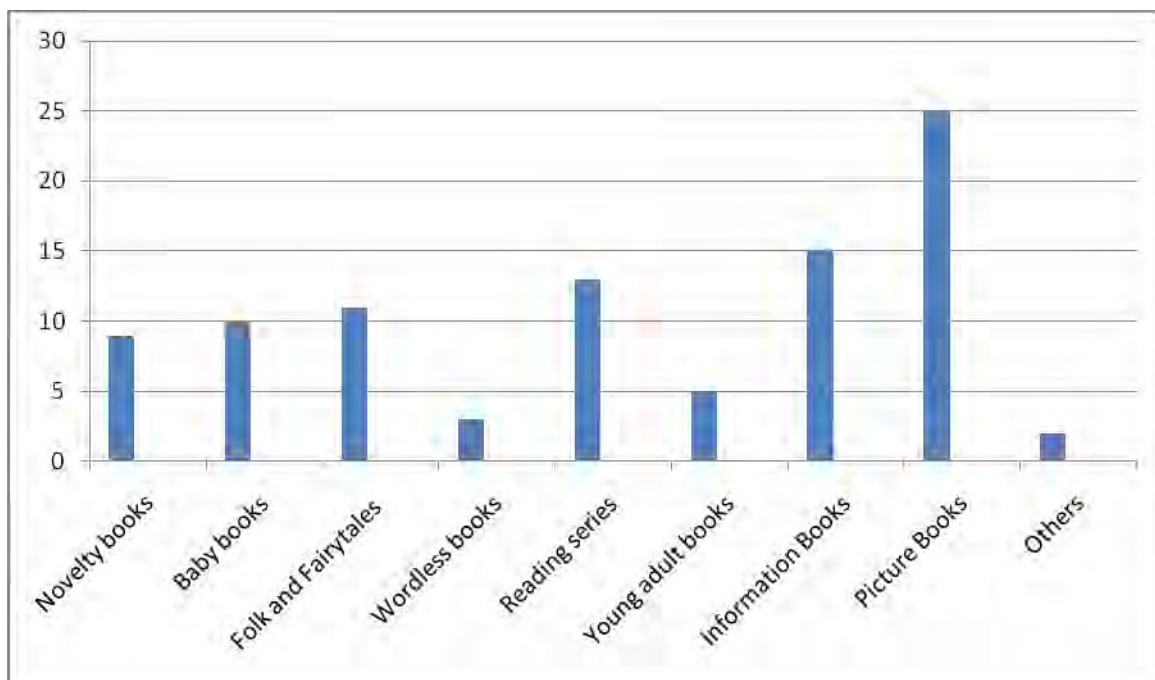
Parents represented the highest percentage of customer respondents in the Omani questionnaire, making up 59% of the total. Parents are one of the important children's book customers at the Muscat International Book Fair, highlighting their important role and the need for children's book publishers to market to and target parents. Around 38% of respondents were school-teachers, and two of the people who answered "others" were a librarian and a preschool principal. This reflects the Ministry of Education's role in promoting reading and encouraging teachers to visit the book fair.

Muscat Figure 4: Criteria for Buying a Book



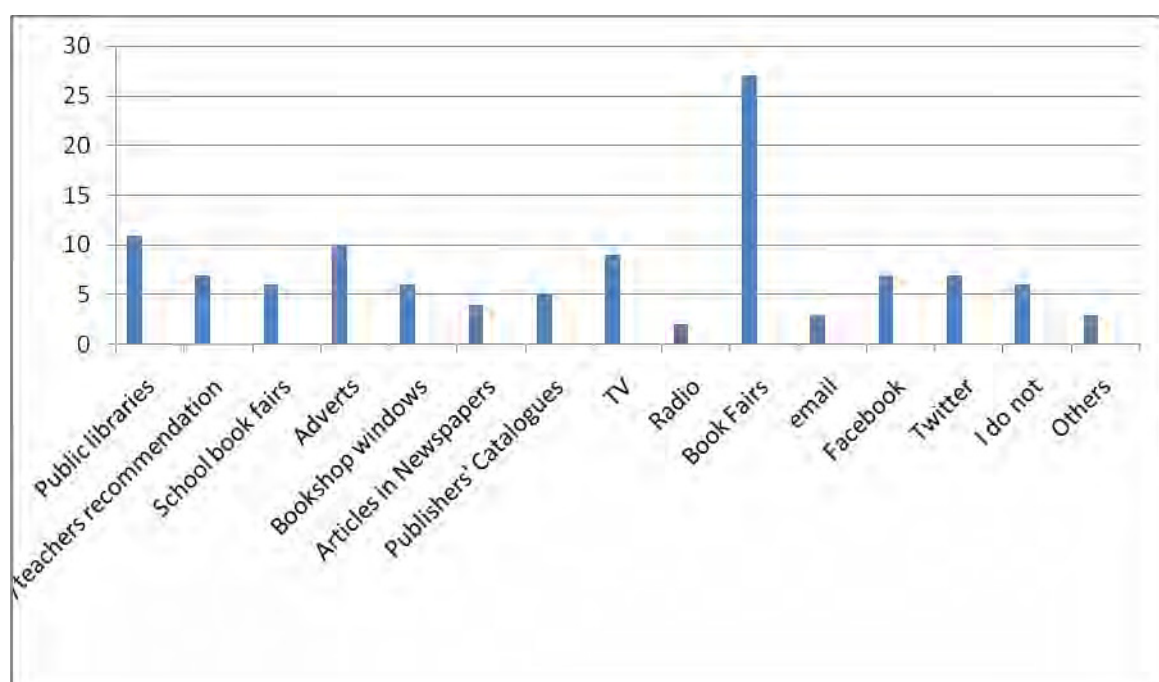
Omani respondents were cooperative in their responses, selecting more than one option when asked about the criteria they follow to choose children's books. Topic was the choice that most respondents chose, 80%, while the cover and the price were two other popular choices selected, with 47% and 36%. Around 22% of the respondents chose the title as a criterion to choosing a book, and 18% chose the author. Fewer than 16% of the respondents chose publisher, illustrator, size or cover as criteria affecting the choice of books. What is apparent from the results above is that customers are mainly concerned with the topic and what the book will be discussing. All other choices, not directly concerned with the topic and content of the book, were chosen by fewer than 50% of the respondents when compared to the "topic" choice (which will be discussed further in Chapter Five). The *Oman Country Review* stresses the fact that since "Oman is generally a conservative Muslim culture, Islamic behaviours and practices should be respected" (2012). The religious Omani culture is also apparent in their literature which was historically "limited to religious treatises and histories" (2012).

Muscat Figure 5: Kinds of Books



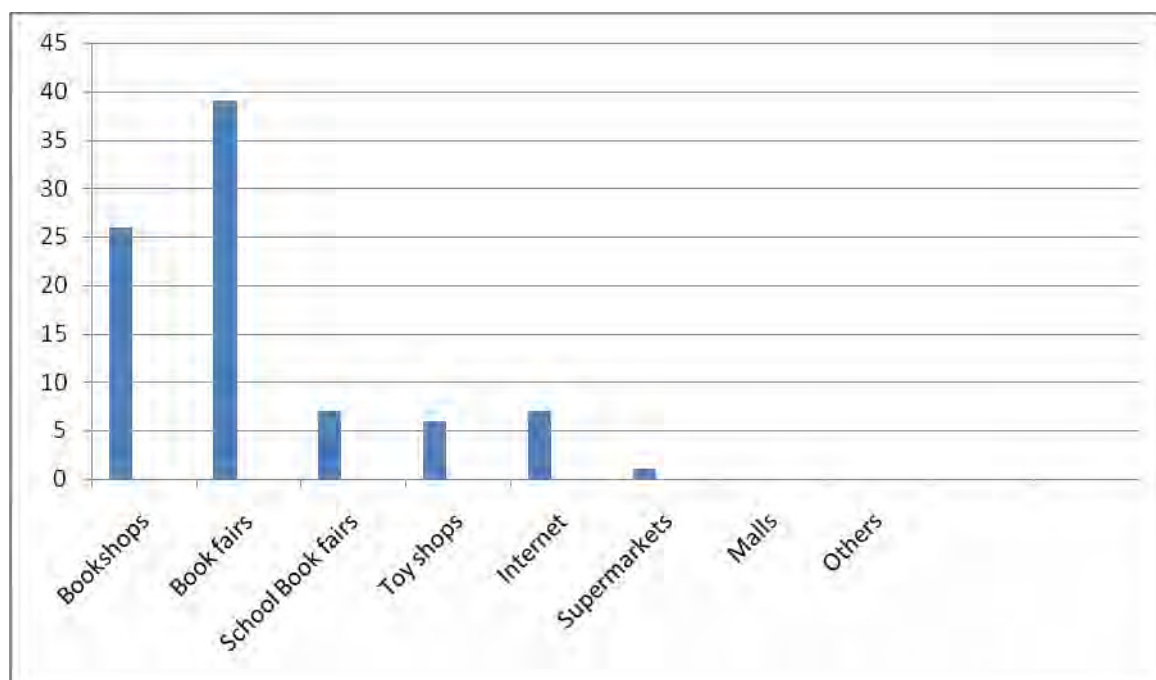
Around 56% of the respondents wanted to buy picture books from the book fair. 22% of the customers in the Muscat International Book Fair chose baby books. The Omani customers generally ticked more than one choice from the different categories in this question. Folk-tales were chosen by 24% of the respondents, which supports the importance of this format to Omanis who emphasise the role of tradition (as discussed above). Approximately 33% of respondents wanted to buy information books highlighting the role of education and the book as an educational tool. Respondents who chose “others” intended to buy books that teach and books with actions and incidents.

Muscat Figure 6: How Do You Find Out About the New Children's Books?



When customers were asked about where they knew about the new children's book titles, 60% chose book fairs, emphasizing the role of the book fair in promoting books in Oman. However, that the questionnaire was completed by book fair visitors likely played a role in the choice. Nearly 20% of customers indicated that they knew about new books from adverts and television. Approximately 15% of respondents knew about new children's books through Facebook and Twitter. Media and social media are mediums to which some customers are exposed. Social media has potential in Oman, and more studies and experimentation are needed there to measure their effect on marketing children's books. 20% of customers do not know about new children's books in the market, which can be the result of the minimal marketing techniques used by publishers, and the developing market. School book fairs, bookshop windows, articles in newspapers, radio, and emails have been minimally chosen by respondents, reflecting their weak role in promoting children's books in Oman.

Muscat Figure 7: Where Do You Buy Your Books?



The vast majority of the respondents, 87%, buy children's books from book fairs, while around 58% buy from bookshops. Since the questionnaire was administered in the book fair, this might have affected this choice's popularity as a buying source for children's books for Omanis. 16% buy books from school book fairs, which seem to be not well developed in Oman due to the presence of very few publishers and/ or lack of any distributor. For instance, through our work in Asala, Publishers we do not know of distributors who work on organizing school book fairs in Oman. Few people buy books online or from toy shops, highlighting their weak role in selling books. In the *muscatdaily.com*, Ramu Patil discusses online shopping in an article called *Online Shopping Trends Picks up in Oman* in 2012.

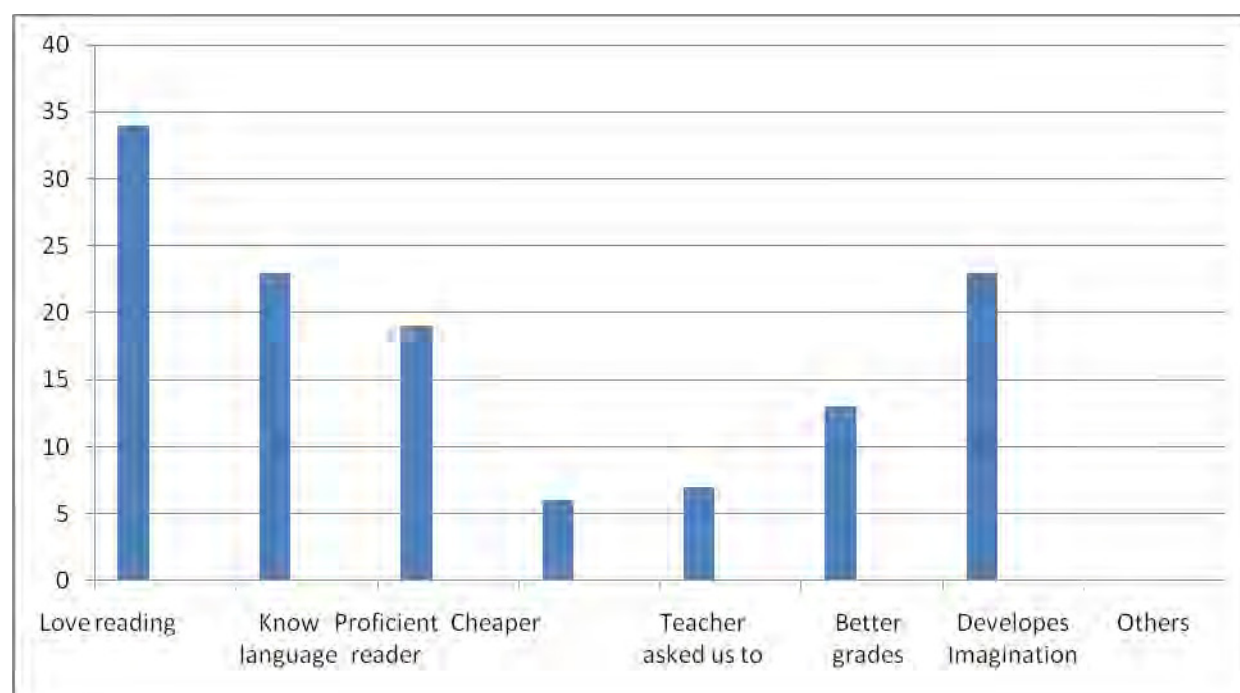
Petil (2012) predicts that online shopping habits will change but slowly in Oman for several reasons:

- “[p]romoters of e-commerce sites hope that the increase in Internet penetration, from 20% to 78% in last three years is likely to further boost their business”
- Muscat is “dotted with hypermarkets offering several deals, still like to “touch and feel” a product before buying it, the younger generation is not averse to online shopping”
- shopping habits will not be easily changed
- “not many use high-speed Internet”

- “reservations” about online payments are still found

Even though Petil draws a picture of Muscat’s many hypermarkets, none of the respondents at the book fair chose the mall or the supermarket as an outlet to buy children’s books. This can be due to the limited presence of books in those outlets in Oman, or because people are not used to buying books from hypermarkets and malls.

Muscat Figure 8: Why Do You Buy Arabic Children's Books?



Around 76% of the respondents in Muscat buy children's books to help their children love reading, while 56% believe that the books would help the child to become a better reader. 51% buy the books in order to help the child develop imagination, the results are surprising since Oman is a very traditional market. 51% believe that children's books will help the child learn the Arabic language. Few respondents chose "cheaper than other language books" and "the teacher asked us" as choices. Promoting and developing reading seems to be one of the main reasons behind buying books for Omanis. One person who chose "others" mentioned that the reason behind buying children's books is "because reading is important", which again stresses the importance of promoting reading for Omanis.

Conclusion

Oman is a small country in the Gulf with plans to develop the cultural and educational fields. However, plans for development seem slower than in many other Gulf countries, especially the UAE, which will be discussed in detail in the following sections. There is a greater emphasis on learning and the importance of books for learning, which is reflected in the respondents' selection of "topic" as the main criterion to choosing books. Customers mainly seek to buy picture books for children between the ages 4 to 9, which is also reflected in the Lebanese children's book publishers' production being concentrated on this age group. There are very few public libraries and book-selling outlets in Oman and the

capital's book fair is one of the main cultural activities in the country to buy and learn about the new titles. Like most Arabs, Omanis are hesitant to buy online, quite a good number of respondents buy from bookshops, and the book fair is still one of the main outlets for buying books.

Omanis have to wait a whole year to buy their books at the exhibition...Investing in libraries would be a concrete step toward building the 'learning society' that Oman needs now more than ever. The trick is to convince developers and public officials that libraries deserve funding as much as luxury condominium complexes and hypermarkets. (fjordlord, 2010)

Although the Omani responses had many similarities to Kuwait and Qatar, many chose more than one selection in the questionnaires reflecting a customer with more reasons behind purchases, a customer who was willing to spend more time on selecting from the available choices, or just the nature of a customer who is willing to have more than one selection in order to provide a better personal image.

Kuwait, Qatar, and Oman are three Gulf States that host three important Arabic language-selling book fairs that many Lebanese children's book publishers take part in. The UAE, unlike the other Gulf States, hosts two main important Arabic Book fairs around six months apart: the Abu Dhabi International Book Fair and Sharjah International Book Fair. The next section will discuss the two book fairs, keeping in mind the specifics of two book fairs in the same country:

The UAE

UAE Information – Table 4

	Population	GNI/year	Libraries	Bookshops	Price of loaf of bread	Price of milk	Basic cost of living(electricity, water, garbage...) of 85sqm apartment
U.A.E	5.47m	\$49,500	9	41 Dubai 13 Abu Dhabi 13 Sharjah	\$1.1	\$1.5	\$132

(*Around Town*, 2015) and (*Bookshops in Ten Yellow Pages*, 2015)

The UAE has a population of 5.47 million people, with a GDP per capita (2012) of US \$49,500, and “has achieved steady progress over the past three decades to emerge as a significant global player in both the political and the economic arena” (*United Arab Emirates: Country Profile*, 2013, pp. 11-12). The average income in the UAE is relatively high with very high costs of living too.

The federal government in the UAE allocated US \$2.7 billion in 2013, 25% of its total spending, to education which is reflected in literacy levels of up to 91% (2012) (*United Arab Emirates: Country Profile*, 2013, p. 50).

In the UAE, there has been funding for public library spaces. Some of these library projects, according to al-Muhairi, have been responsive to community needs. Yet al-Muhairi, who is a former librarian and current head of the Abu Dhabi Tourism & Culture Authority’s Cultural Resources Centre, said there were still issues of equity and accessibility. There are a number of areas outside the major cities that still lacked proper library resources. (Lynx, 2015)

Efforts and budgets are being allocated for public libraries in the UAE especially in capital cities but there is a need to develop public libraries.

Despite the extent of this undertaking, the regional statistics do not show much improvement. Analysed by country, “the results make... uncomfortable reading. In an Arab League table of readers by nation, the UAE comes fifth behind Bahrain, Egypt, Morocco and Iraq. In the Emirates, just 22% of people regard themselves as regular readers. Most of those were well into their 40s and older” (Yaqoob, 2011). Government efforts in the UAE are necessary to encourage reading.

The lifestyle and stability of the country makes it attractive for Lebanese children's book publishers to target as a market.

Abu Dhabi International Book Fair

Introduction

Abu Dhabi is a rich, stable, and developing city. According to Hart (2003), "Abu Dhabi is the seat of government and undisputed power behind the UAE occupying a lion's share of the federation's land and 80% of its oil. It controls some 10% of the world's reserves plus 5% of its natural gas; or 100 billion barrels and 60 billion cubic meters respectively". The city's status affects the lifestyle of the Abu Dhabi citizens positively, who have high living standards.

Abu Dhabi's government is working on promoting reading, education, and publishing. The development is also seen in the schools reflected in teachers' training and resources development, including school library and classroom libraries.

The National Library in Abu Dhabi expansion allows for the purchase books from the Abu Dhabi International Book Fair every year. Tan notes that the National Library of Abu Dhabi "has intensified its reading promotion activities and research on anything book related. It has also just made available the world's only Arabic encyclopaedia of poetry on CD-ROM and online" (Tan, 2009).

The Abu Dhabi Authority for Culture and Heritage (ADACH) organizes the Abu Dhabi International Book Fair, adapting and changing the fair to become a professional book fair with the help and consultation of the Frankfurt Book Fair team. Tan (2009) remarks that "ADACH has been busy modernizing the region's publishing and bookselling industry and facilitating cultural exchanges between the Arab-speaking region and the rest of the world".

Since 2007, the Abu Dhabi International Book Fair has a programme called Kalima that gives translation grants for Arab publishers to translate from other languages, in order to invite foreign publishers to take part in the book fair and attract more Arab publishers.

In an interview with Davies, KITAB's (the Abu Dhabi Authority for Culture and Heritage and the Frankfurt Book Fair's joint venture company) general manager Claudia Kaiser highlights the important role of the Abu Dhabi International Book Fair and the upcoming events relating to education and developing publishing. Kaiser stresses that

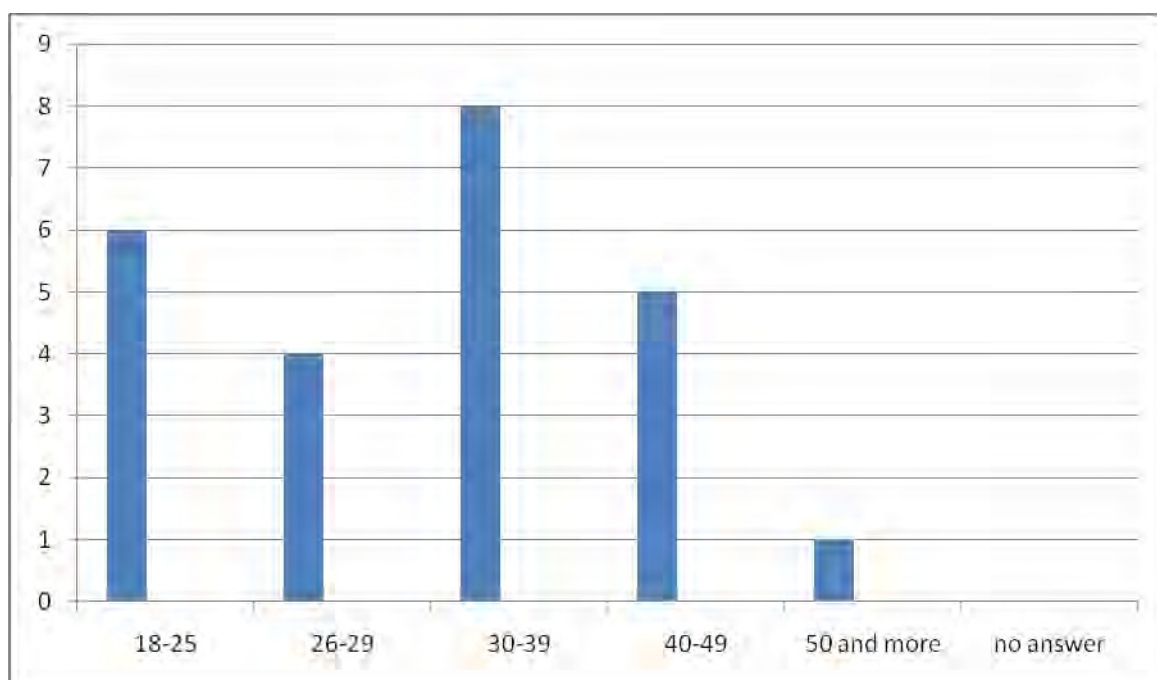
[w]e are dedicated to raising the bar of industry professionalism by creating the world's best networking platform for international and regional publishing communities. While creating a love of reading is something that needs to be developed, one area where there is already a booming market is the education sector. The Abu Dhabi Education Council (ADEC) is currently overseeing a huge programme of curriculum reform, which will see new teaching methods and resources. The changes were outlined in the fair's two-day Education Chapter attended by 250 publishers, teachers, and leading educational authors. Dr Robert Thompson, head of special projects at ADEC, says the council has a substantial budget to purchase new educational titles for both teachers and students across a range of ages and subjects: "Publishers are seen as partners; we want to resource schools as best we can with good books in Arabic and English. (Davies, 2009)

The Abu Dhabi International Book Fair in 2014 had more than 1,000 exhibitors from fifty countries, showing more than 500,000 works and Humaid Matar Al Dhaheri, the Chief Commercial Officer at ADNEC (Abu Dhabi National Exhibition Centre), calls it the “the fastest growing publishing event in the world” (uaeinteract.com, 2014).

The Experience of Customers' Questionnaire

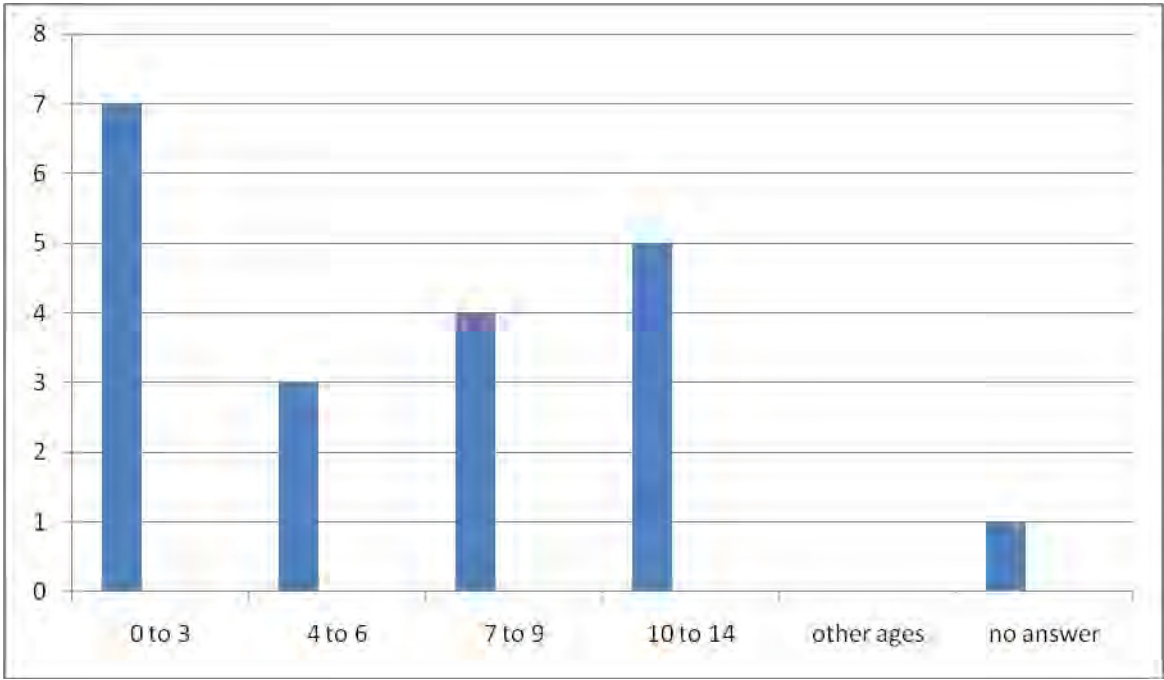
Asala's team, like many other Arab publishers, makes sure to take part in the Abu Dhabi International Book Fair. The event is an important venue to network with existing customers and present the new titles, submit new titles to ADACH to secure new orders, to meet new customers, and sell to the public, especially the school-students that the government gives money-coupons to use in the book fair. The book fair is only five days, unlike other Arab book fairs that can last up to fourteen days, which makes it a stressful and busy time for the sales team to work from 10 am to 10 pm and not to miss opportunities and passing customers. Completing the questionnaire was affected by the nature of the short and busy book fair, where customers are also in a hurry to visit the big book fair halls and stands. I was able to complete nineteen questionnaires, mainly completed by female respondents (89%). Women are – as usual – the main children's book customers in the Arab World, which is reflected in the percentage of visitors to the children's book stands and the respondents.

Abu Dhabi Figure 1: Age of the Adult



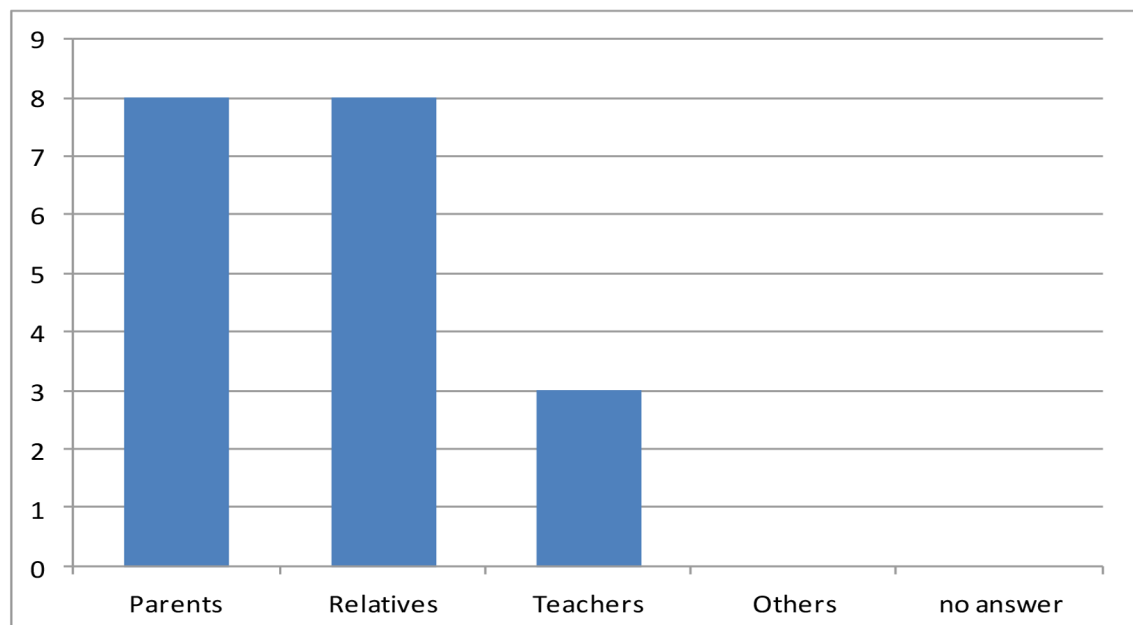
The respondents in the Abu Dhabi International Book Fair questionnaires were divided between the different age group sections, with slightly more respondents in the 30-39 and 18-25 age groups. Fewer respondents were of the age fifty and up. The variety of the respondents' age groups would help give a wider range of responses from the different members about their opinions and habits in buying children's books.

Abu Dhabi Figure 2: Age of the Children



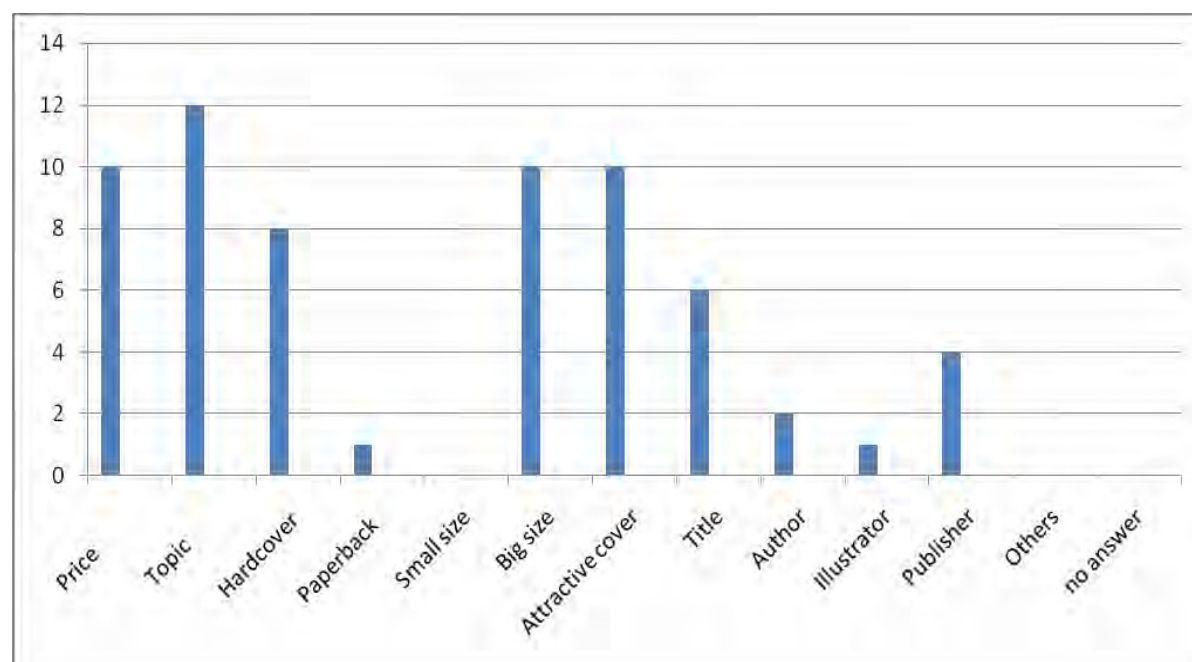
Approximately 37% of the respondents wanted to buy baby books, the highest total of any book fair. Abu Dhabi is a city with people from different nationalities working and living there, and the interest in buying baby books might have been affected by the different nationalities at the book fair, in addition to the development in education. 26% of the respondents bought books for children of ages 10 to 14, which is again different and higher than most of the other Arab book fair responses, since there are few titles published in Arabic for this age group. 16% of the customers bought books for children of ages 4 to 6 and 21% bought books for children ages 7 to 9.

Abu Dhabi Figure 3: Relationship to the Child



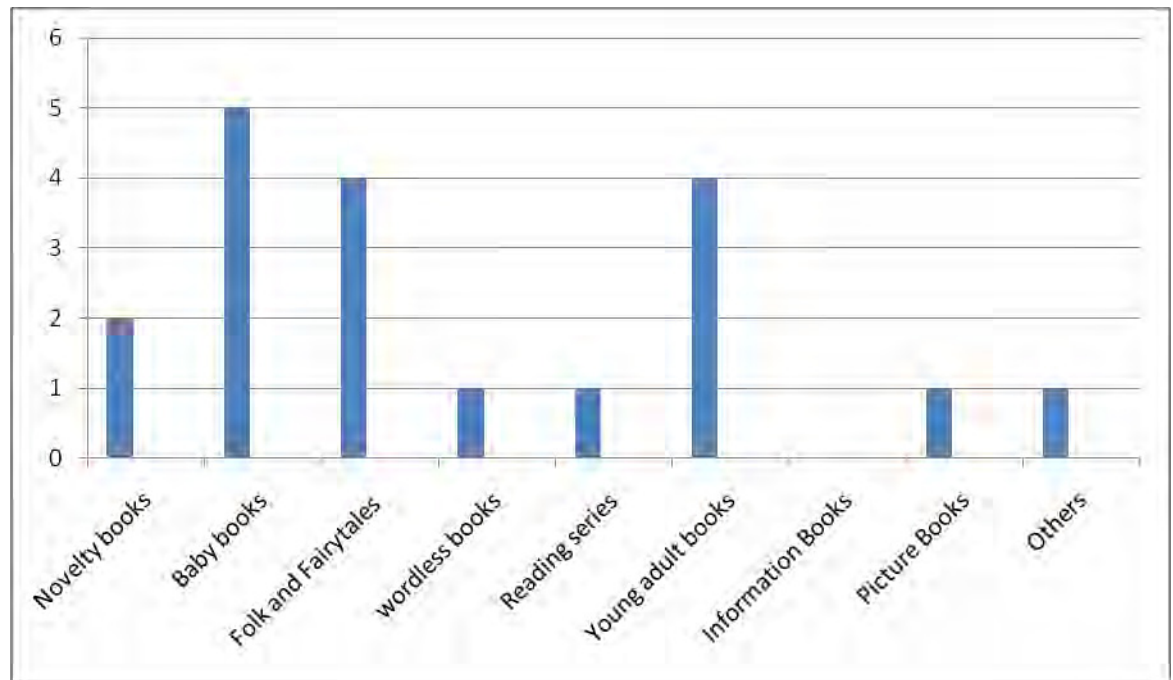
The Abu Dhabi questionnaire respondents covered a variety of customers, with a majority of parents and relatives and fewer teachers. Parents are the main children's book customers in the Arab World, and other relatives in Abu Dhabi play a main role in children's books purchases. Surprisingly very few teachers responded to our questionnaire, since teachers were either in a hurry or taking care of the children they were with (morning schools' visitors). As publishers displaying in Abu Dhabi book fair, a big percentage of our customers are teachers but teachers usually take a couple of hours from schools to check the titles in the fair and/or accompany children who come to buy books from publishers.

Abu Dhabi Figure 4: Criteria for Buying a Book



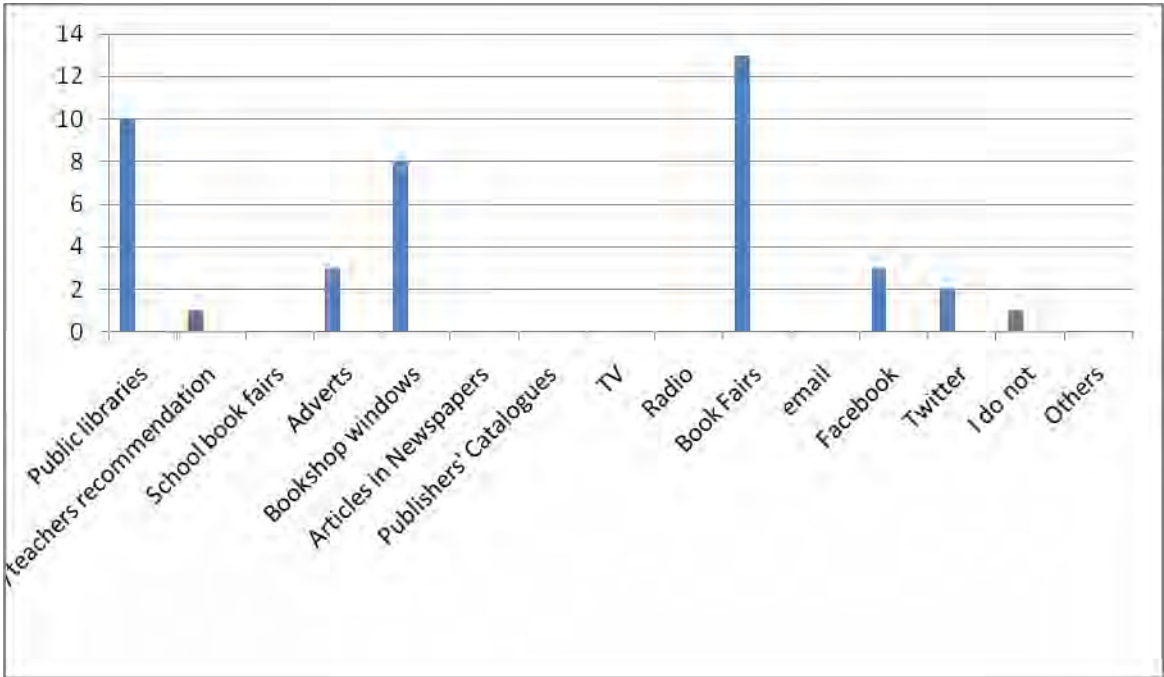
Customers in Abu Dhabi made more than one selection when they were asked about the criteria they use to purchase books. It is worth noting that all the customers who chose topics (63%) ranked it as a first choice giving it a higher importance in our research. Many customers chose price (53%), big size (53%), hard cover (53%), attractive cover (53%), and title (32%). The choices can be a sign of the involved customers who are aware of the reasons behind purchases. Abu Dhabi is one of the richest areas in the Arab World and the choice of price was a bit surprising (the results from different book fairs will be analysed in detailed in Chapter Five). 21% of the customers chose the publishers, while very few chose the author and illustrator showing their minimal role in the Arab World.

Abu Dhabi Figure 5: Kinds of Books



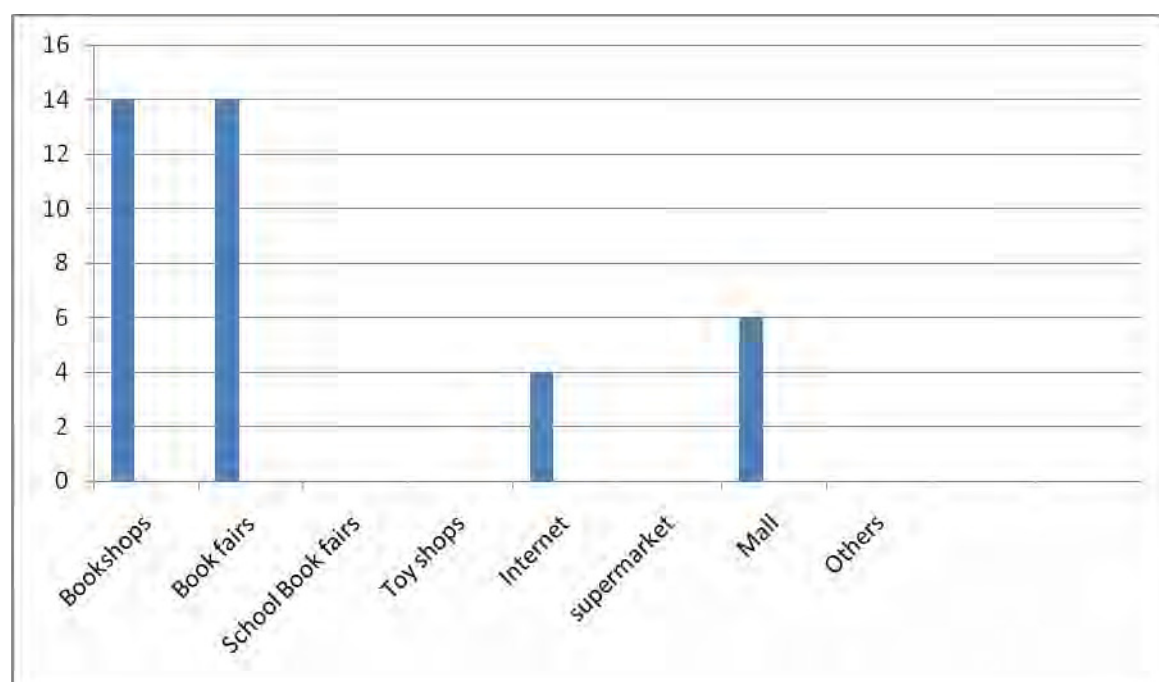
When children's book customers in Abu Dhabi were asked about the kinds of books they were looking for, the results were different from all the other markets, where the majority of customers with babies (0-3) are reflected by their intentions to buy baby books. In addition, customers with teenage children intend to buy books for this age group. Surprisingly, only one customer intended to buy picture books and reading series.

Abu Dhabi Figure 6: How Do You Find Out About the New Children’s Books?



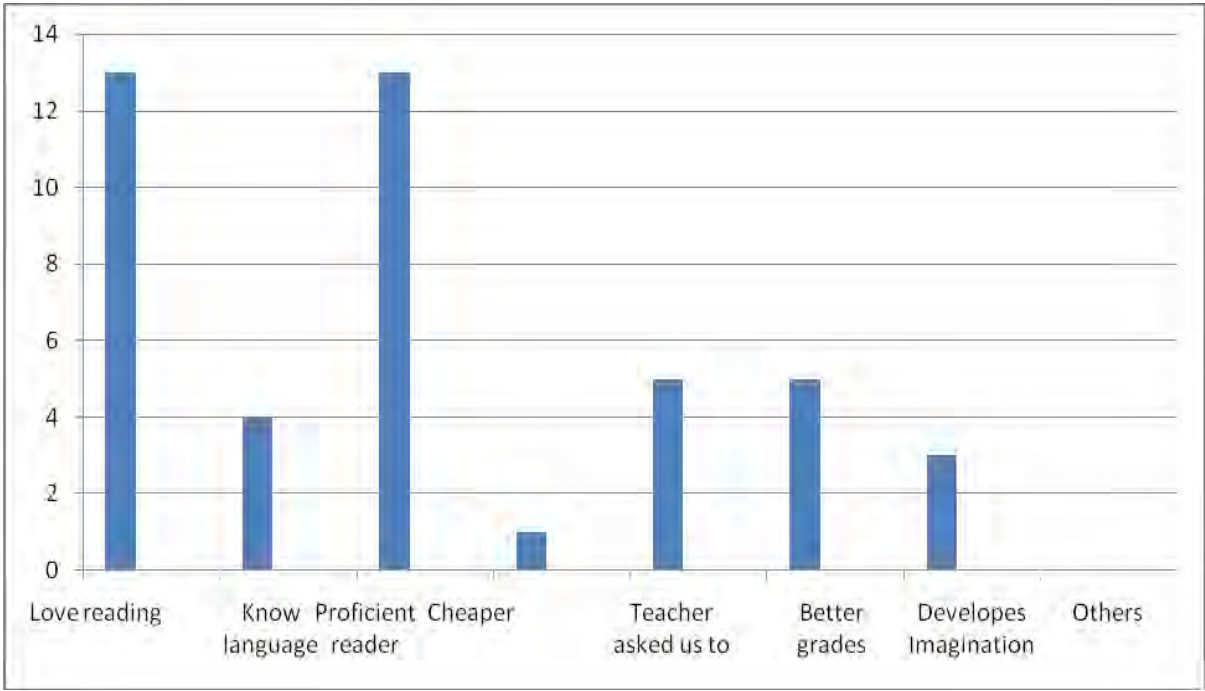
The majority of children’s book customers in Abu Dhabi (68%) find out about new books through book fairs, once again highlighting the importance of book fairs in the Arab World in presenting new titles. Public libraries in Abu Dhabi play an important role in presenting new books for customers, and this is strongly reflected in the yearly orders made by ADEC to purchase new books and distribute them in schools and public libraries. Approximately 42% of respondents find out about new children’s books from bookshop windows, reflecting their role in both presenting and selling children’s books (refer to Abu Dhabi Figure 7 on the next page). Social media and media play a minimal role in presenting new titles for children’s book customers in Abu Dhabi, suggesting their weak role in the market.

Abu Dhabi Figure 7: Where Do You Buy Your Books?



The majority of the respondents in Abu Dhabi buy books from bookshops (74%) and book fairs (74%), which again highlight the role of book fairs in the Arab World and the importance of bookshops in Abu Dhabi. Around 32% of respondents purchase books from malls, which also reflects the spread of malls in the UAE in general and Abu Dhabi specifically. 21% of the respondents in Abu Dhabi purchase books online, which is higher than any other Arab market. According to European Travel Commerce, the “UAE currently leads the region for online sales, although ecommerce penetration is still low. Whereas internet penetration in UAE reaches 80%, only 15% of internet users shop online” (*Ecommerce Insight*, 2014).

Abu Dhabi Figure 8: Why Do You Buy Arabic Children’s Books?



The respondents selected more than one choice when they were asked about the reasons behind buying children’s books. The majority of the respondents purchase books to help their child love reading (68%) and to help the child become a better reader (68%). 26% of the customers buy books upon the teachers’ request and the same percentage of respondents believe that books help the child to get better grades in school, reflecting the role of children’s books in supporting the learning process at school.

Conclusion

“If Abu Dhabi could be summed up in one word it would be “growth”...The fair's importance in Abu Dhabi is undeniable” (Davies, 2009).

UAE, and the emirate of Abu Dhabi in particular, seems to be witnessing a kind of ‘policy hysteria’ (Stronach and Morris 1994, cited by Glatter, 1999) whereby waves of reform are being introduced in a short time span, seemingly in an effort to find the magic recipe for success. (Thorne, 2011)

Both Davies and Thorne stress the fast-changing pace and growth in the Abu Dhabi market. The results from Abu Dhabi were different from most of the other questionnaires in other cities. This highlights the characteristics of children’s book customers in Abu Dhabi who are: ticking more than one choice, buying baby books and young adult books, being a relative and not only a parent, choosing more than one genre/format and format of

book to purchase, looking for books with main criteria of topic, price, hard cover, and attractive cover, buying from bookshops and book fairs, and starting to buy books online. For the Abu Dhabi customer, purchasing children's books thus serves several purposes.

The Abu Dhabi International Book Fair itself is different from all the other book fairs in the Arab World since it is shorter, becoming professional (funds for translation are provided to encourage change), school children are given coupons to buy books, and institutions like ADEC (Abu Dhabi Educational Council) also purchases large number of books in the fair. As a result, publishers in the Arab World are eager to participate. Abu Dhabi is a market with much potential to grow.

Sharjah International Book Fair

The Sharjah International Book Fair is one of the major book fairs in the Arab World, particularly for children's book publishers. The fair began in 1982, and "draws a total of over 800 publishers showcasing books from nearly 42 nations, and attracts over 400,000 visitors" (*Sharjah International Book Fair*, 2012).

The book fair's slogan "for the love of the written word" encapsulates what it hopes to be about, while the stated vision is "to be at the centre of knowledge and literature in the region", and its mission is "to cultivate people's love for literature by enriching their experience of the written word" (*Sharjah International Book Fair*, 2012). Sharjah International Book Fair promotes its activities on social media, especially Facebook and Instagram.

The visitors to the book fair are usually schoolchildren attending the event with their teachers in the morning, and families and individual teachers in the afternoon. Children's book publishers sell well at the Sharjah event. For example, in 2010 children's book sales came in third place after religious and cultural books. In addition, in the last several years Knowledge Without Borders, an initiative by HH Dr Sheikh Sultan Bin Mohammed Al Qassimi, has helped push the sales at the book fair up by buying children's books from publishers. To encourage cultural reading, "the Knowledge Without Borders programme has the ambitious goal of providing 42,000 Sharjah families with individual libraries of fifty books, including a display case to contain them" (Rossetti, 2009).

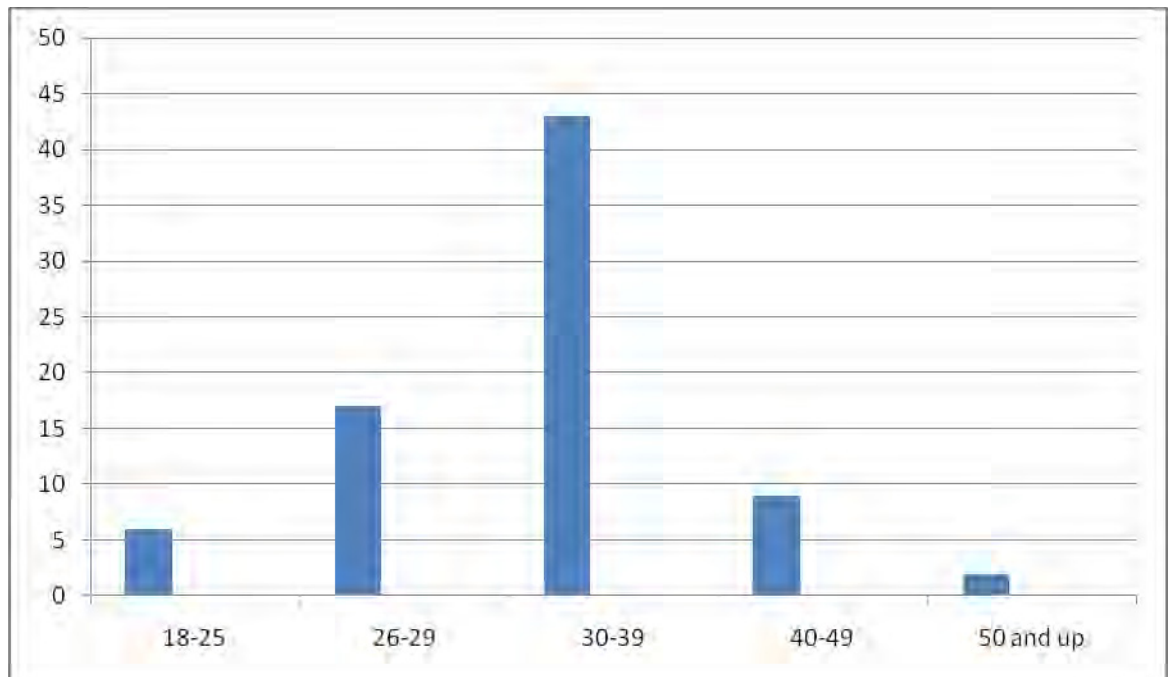
Most of the Lebanese children's book publishers were present in the book fair. Six of the smaller ones did not sell their books directly, but were available through other distributors. The costs of accommodation, travel, shipment and stand fees in Sharjah are considered average (lower than in Abu Dhabi but higher than Cairo).

The experience of questionnaires

I received seventy-nine completed questionnaires from respondents, which is the highest total of any book fair. Many people were either in a hurry (especially school teachers), busy with children, or were not interested in communicating. But since the book fair had a children play area in the book fair hall, I followed some mothers there where they had more time to answer while their children were playing.

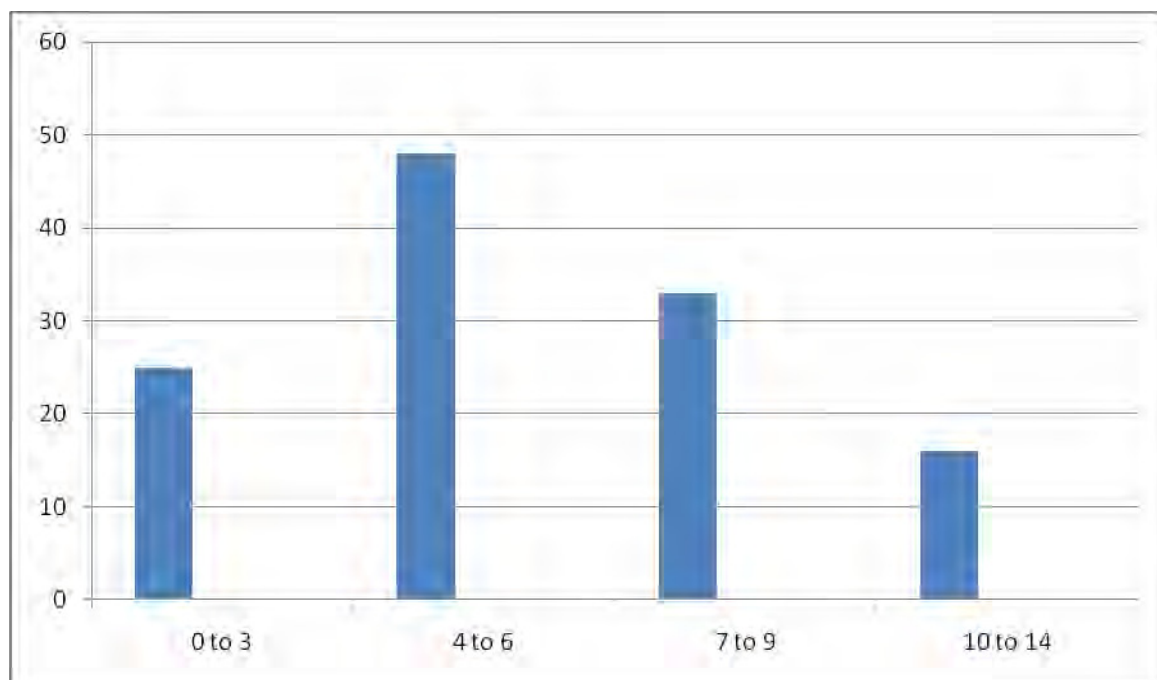
When respondents are given options in the questionnaires, the customers usually like to either go with one choice or stay away from ranking the selected choices. This is because respondents were either in a hurry and liked to go with the first choice, tried to go with the most obvious answer, or did not want to ask for clarifications.

Sharjah Figure– 1: Age of the Adult



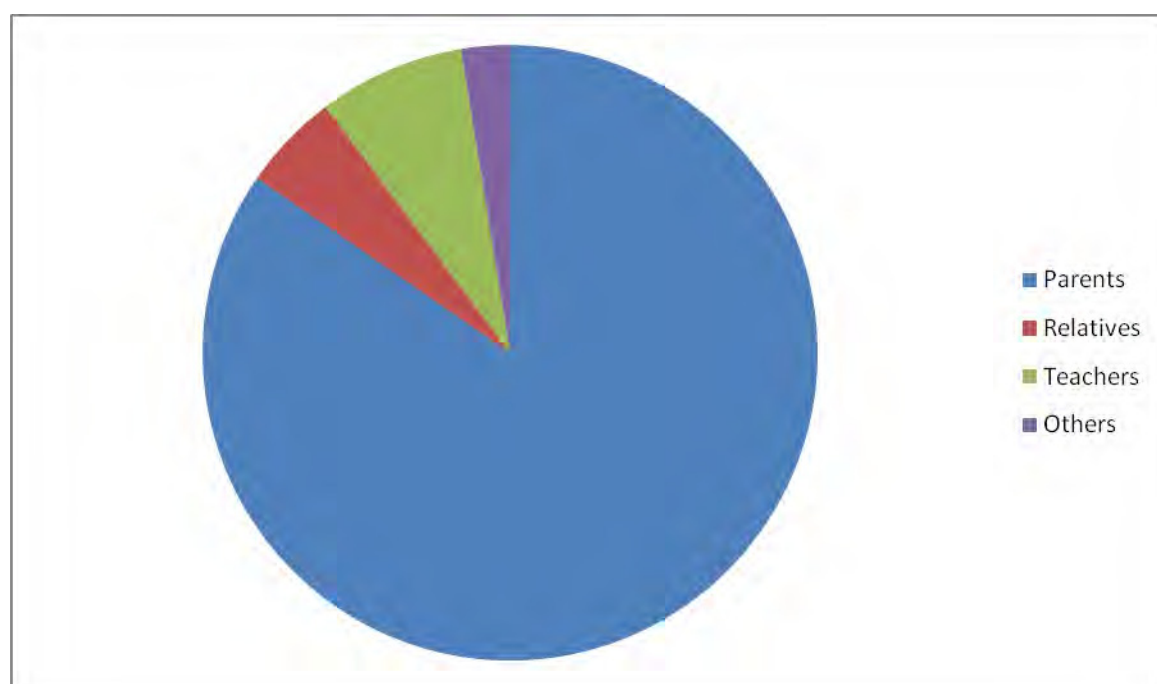
The majority of the visitors to the children’s book publishers were females and I was able to complete the questionnaires from approximately 83% female respondents. Around 56% of the respondents were in their thirties, and fewer than 3% were older than fifty. Approximately 9% of the respondents were between the ages of 18-25, and 13% were in their forties. The results highlight the importance of marketing and targeting women in their thirties in Sharjah.

Sharjah Figure 2: Age of the Children



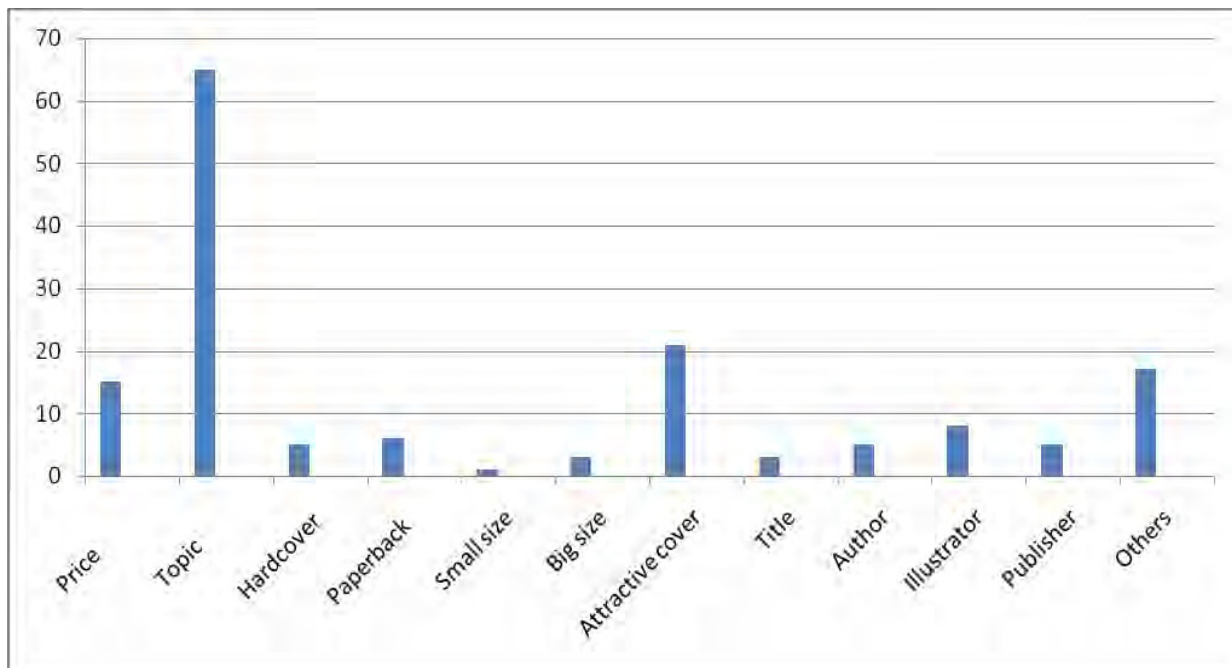
A plurality of books purchased at the fair (61%) were for children ages 4-6, 43% for children of the age 7-9, and 31% for children of ages 0-3. Very few respondents (18%) were buying for children of the ages 10- 14. The results reflect the Arab publishing trend towards elementary school children, while very few books are being produced for younger and older children. Most of the respondents were buying for more than one child, which is probably due to the fact that families in the UAE tend to have more than two children.

Sharjah Figure 3: Relationship to the Child



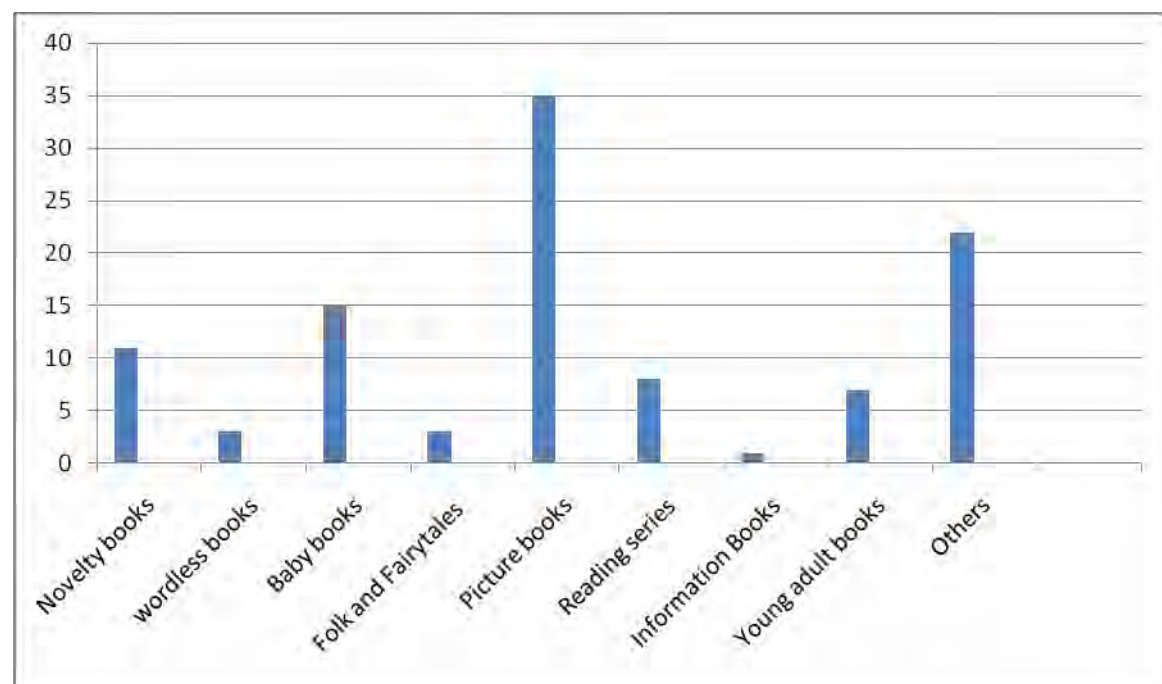
During weekday mornings, the book fair is usually full of school-children who come with their teachers to visit the fair and buy books. The afternoons are more for families and teachers who are interested in looking at the new titles and in visiting the publishers. Most of the survey respondents were mothers, since the school teachers in the morning were not able to leave the children and in the afternoons the teachers were usually in a hurry trying to visit the publishing stands. Roughly 85% of the respondents were parents while only 5% were relatives (other than parents), including a nephew and a grandmother. The results highlight the importance of mothers in children's books purchases in Sharjah International Book Fair as elsewhere.

Sharjah Figure 4: Criteria for Buying a Book



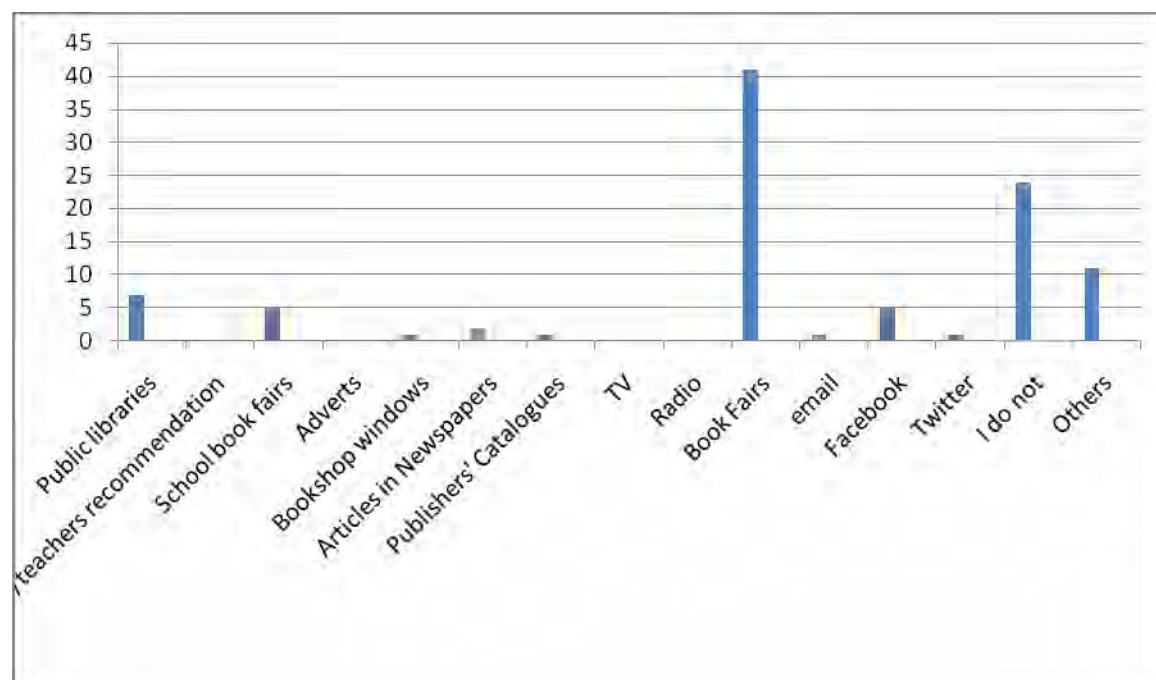
The “topic” was by far the most common factor affecting the purchase decision selection, with 83% of the people indicating it as their first choice or only choice. 21% chose attractive cover as one of the criteria behind purchasing children’s books, while very few people chose “title” (4%) or “size” (6%) as a criterion in buying a book. Others answers included illustrations (5 times), educational, colours, layout, minimal words, readable font, how the story is handled, attractive and easy, reading level, scientific concepts, age appropriate, and ideas. The results above highlight the importance of topic for children’s book customers in Sharjah.

Sharjah Figure 5: Kinds of Books



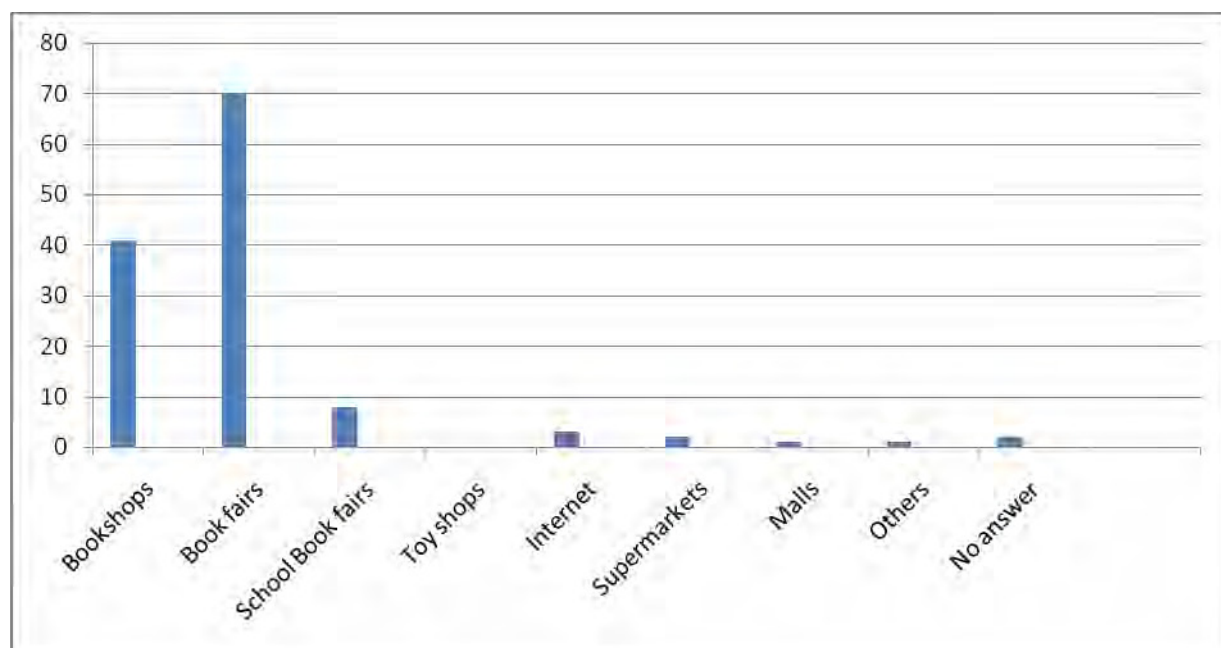
The customers, who did not ask for explanation about genres and format, were biased towards familiar genres and formats. Respondents intended to buy picture books (44%), novelty books (15%), and baby books (19%). On many occasions the children themselves choose the books to buy, and not their parents. Others responses (28%) included activity books, with a moral (twice), animal books, stories (five times), all kinds, any kind (twice), few words, scientific (four times), educational (five times), adventures, books for special needs, books for foreigners, educational (three times), stories for children twelve and up, books that give morals, books that develop thinking skills, light text, and real information. The fact that 28% of the respondents chose 'others' and specified some kinds of children's books, reflects the nature of the children's book customer who is particular and looking for books under certain topics or with special characteristics like texts and illustrations.

Sharjah Figure 6: How Do You Find Out About New Children's Books?



Respondents in Sharjah thought it strange to be asked about how the customers learn about new books in the market. 32% of the respondents did not know about newly published children's books, and when given the choice of the book fair, 54% of the respondents chose it as an option. When passing by our stand teachers showed more interest than parents in hearing about the latest book titles and looking for them. Other responses included publisher's website, book fair website (three times), bookshops (two times), from children, internet, friends, teachers, and emails sent by a publisher. The responses from mothers indicated that the majority were not looking for the latest titles while the teachers were following up with the publishers about their new titles. The results highlight the role of the fair in presenting new titles to children's book customers.

Sharjah Figure 7: Where Do You Buy Your Books?

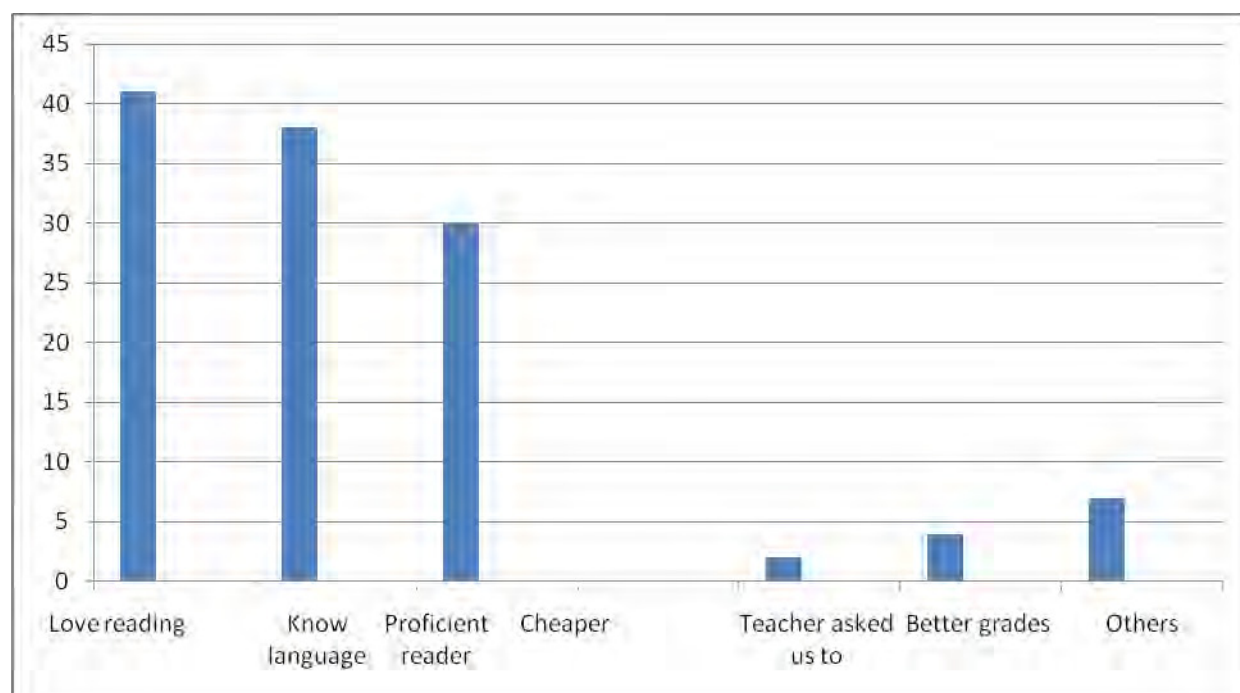


Book fairs and bookshops are the main outlets to sell children's books in Sharjah. It is worth noting that interviews have been administered on book fair customers affecting the results. Most parents and teachers (90%) bought their books from the fair, and specified that this was the main reason why they visited. Some found it strange that books might be sold somewhere else. 58% of the respondents bought children's books from bookshops, and 4% of the respondents purchased books online. In 2009, Google surveyed 1,410 consumers in UAE to study their purchasing behaviour:

Amongst UAE residents, the Internet is the 'information tool' used most often when researching possible purchases across a range of categories including digital cameras/camcorders, mobile phones, cars as well as hotel reservations...In general, as a mean average across the 20 products listed in the survey, 11% of all product purchases were researched and purchased online; 28% were researched online but purchased offline; 5% were researched offline but purchased online; and 56% were researched and purchased offline. (*Google Survey in UAE, and an Agency Day, 2009*)

This explanation accounts for why people are not used to buying online. In addition, "[i]n the UAE, English (76% of respondents) is by far the most popular 'search' language (likely to be related to the highly multinational nature of UAE society) vs. 23% preferring to search in Arabic" (*Google Survey in UAE, and an Agency Day, 2009*). This might be another constraint, since people are used to surfing in English and most Lebanese publishers publish Arabic books.

Sharjah Figure 8: Why Do You Buy Arabic Children's Books?



When respondents were given options for the reasons behind buying children books, the majority (52%) bought children's books to help their children love reading, while 48% believed that children's books would help the children learn the Arabic language. Quite a few preferred making more than one choice, but not ranking them. "Other" responses included "educates and is useful," "introduces books with high levels of thought," "cultural" (two times), "healthy upbringing", "knowledge and awareness", and "expand knowledge". Respondents might have felt that there was another useful dimension to buying books and that the customers were being appreciated for the important role in their children's lives when they bought a book and contributed to the children's upbringing, and this was reflected in the smiles while answering this question.

Conclusion

The data from the questionnaires reveals that children's book customers in the Sharjah International Book Fair are mainly mothers in their thirties buying books for their elementary school age children. Mothers focus on picture book topics and want to develop the love of reading in their children.

There are special characteristics that differentiate the UAE market in particular and the Gulf market in general. First of all, the UAE is a growing market, with Sharjah being the third largest economy in the country. According to the *Middle East Economic Digest*, "Sharjah's economy has expanded at an unprecedented rate in recent years. GDP growth

has averaged 15 per cent a year since 2002” (MEED, 2011). However, the purchasing behaviour of Emiratis in general and women in particular should be taken into consideration. In a 2011 study on the retail apparel industry, the UAE showed a positive growing market, but also some downsides.

Despite the fact that brand consciousness in this market is substantial, the loyalty of consumers to specific brands is not always the overriding factor in their decision making. Buyer power is enhanced by a high level of choice, which is generated by the absence of switching costs. Brand loyalty within the top end of the apparel retail industry is connected more with the particular designer than the retailer, although some labels also have their own retail operations. Branding may be irrelevant in poorer regions, with the basic necessity of functional clothing being the main concern. (*Apparel Retail Industry Profile: United Arab Emirates*, 2012)

Emirati consumers tend to focus on a topic or an idea and the benefit that it will provide their children, rather than on brands or publishers. This contrasts with the UK, where Puffin series or Oxford University Press children’s books are linked with the publishers’ brands.

Overall Conclusion

The Gulf States, relatively politically and economically stable compared to other Arabs countries, are rich markets with small populations and the tendency to encourage and improve education. The results from the Gulf book fairs reflect the similarities in the markets, especially the nature of the customer (a mother in her thirties looking mainly at the topic as a main criterion for purchasing children’s books and buying mainly from book fairs and hardly making any online purchases). The results highlight the importance of targeting the Gulf market especially through book fairs and government orders, and keeping in mind most customers’ conservative nature.

Book Fairs in the Arab World Part 2

Lebanon, Tunisia, and Algeria

Images from Beirut International Book Fair



Images from Tunis International Book Fair



(alliance-editeurs.com, 2015)



(Albawabahnews.com, 2015)

Images from Algiers International Book Fair



(dmcdn.net, 2015)



(wikimedia.org, 2015)

Introduction

In the previous chapter I assessed a number of book fairs in the Gulf States, the most politically predictable area in the Arab World, when compared to the other Arab-speaking markets (examined in this research) struggling to adapt to the changes of the Arab Spring. The unpredictability of the political environment in the region limited my ability to visit book fairs, many of which reduced participation rates or cancelled.

Beirut's book fair is one of the main book fairs in the region. Lebanese publishers market and display their books in Beirut in order to reflect their position in both the local and the regional market. The Tunis Book Fair and the Algiers City Book Fair represent small but relevant book markets. An analysis of these book fairs is necessary because both book fairs demonstrate differences in publishing in areas of the Arab World with very low average incomes.

It is worth noting that the French colonization in the Middle East and North Africa had an influence on the area, especially in the use of the French language and on the cultural life.

From here, public libraries had an important role for a lot of nations in order to make knowledge and culture spread, and the development. They gave an important and a special place between the other libraries and making it in the first place. France used this role and this importance since 1830 in order to fight Algerian culture and to defeat the Algerian personality. (*The Algerian Literature*, 2015, p. 9)

The chapter will discuss the questionnaire results from the Beirut International Book Fair, the Tunis International Book Fair, and the Algiers International Book Fair.

Beirut International Arab Book Fair

Introduction

The first section of this chapter will examine the Beirut International Book Fair and the book fair customers' questionnaire results. The table below presents some information about the average living cost of living in Lebanon. The numbers reflect the fact that the average yearly income for a Lebanese is low while the costs of living and costs of basic products is high compared to the average yearly income and compared also to the other Arab States discussed in Chapter Five.

Lebanon Information – Table 1

	Population	GNI/year	Libraries	Bookshops	Price of loaf of bread	Price of milk	Basic cost of living(electricity, water, garbage...) of 85sqm apartment
Lebanon	5m	\$14,160	140	NA	\$0.84	\$1.79	\$141.96

The Beirut International Book Fair, organized by the Arab Cultural Club and the Union of Publishers in Lebanon, is one of the main book events in Lebanon. The annual event celebrated its 57th edition in 2013, making it one of the oldest and best-established book fairs in the Arab World. The fair is usually held each year in December, and lasts for two weeks. Books falling under different genres, for different age groups, and in different languages (including French and English) are all presented. Around 181 Lebanese publishers and 63 publishers from the other Arab states participated in the 2013 fair, with more than 160 signing events (Lebtivity, 2013). Fadi Tamim, president of the Arab Cultural Club which organizes the event every year, stresses that even though Lebanon has passed through many dangerous incidents like wars and Israeli attacks, the book fair has never stopped and its management insists on viewing Lebanon as the capital of education, knowledge, culture, and openness (Arab Cultural Club 2013, p. 4). The Beirut International Book fair is similar to all other Arab book fairs in that it is intended mainly for the general public.

School groups are the most common visitors to the fair during morning hours. For instance, Asala Publishers organizes morning readings in which children come for story-telling sessions with authors or a professional story-teller; their parents or guardians and are later encouraged to buy the books. Talal Salman, director of Assafir, one of the main newspapers in Lebanon, expresses the joy he feels while viewing groups of schoolchildren visiting the book fair, “decorating” the cultural movement and filling the fair halls with hopes for the new generation of readers (Arab Cultural Club 2013, p. 40). During the afternoon, many publishers organize signing events for their authors. Asala Publishers organizes signing events for its children’s book authors, and usually succeeds in attracting large crowds of students, particularly when the book author is a teacher. The weekends are usually the busiest, with parents visiting the book fair with their children. Teachers, librarians, and business customers from the Arab World also visit the fair to examine the latest books and conduct impromptu business meetings. Unlike in the western book fairs,

business customers mostly pass by the stands and do not schedule fixed business appointments (discussed in Chapter Five).

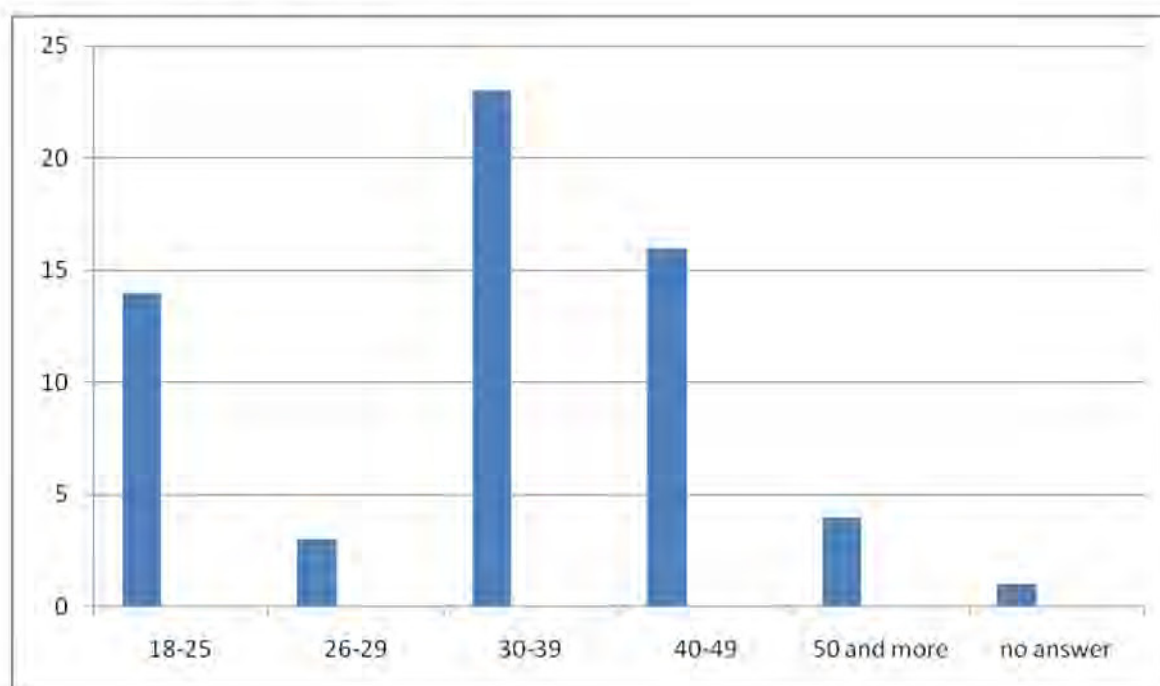
Many Lebanese publishers work hard on projecting their image in the book fair, with the biggest publishers displaying stands of up to 100 square meters. The fair is usually organized in the same way each year, with the biggest publishers receiving the stands in the first aisle. The deeper one goes in the book fair, the smaller the stands. The book fair is not divided according to specialty, since publishers tend to publish books from different genres.

There are many factors affecting the Beirut book fair, not least being the political situation. The escalation of political assassinations in Lebanon in December 2013, in particular, discouraged many visitors from attending, and often schools are reluctant to send children outside school premises. Weather can also be an obstacle, due to the book fair's waterfront location. Heavy storms in December frequently thin the ranks of visitors, especially given the fair's distance from available parking. In times of sunny weather and political calm, the book fair tends to attract more visitors.

The Beirut International Book Fair Questionnaires

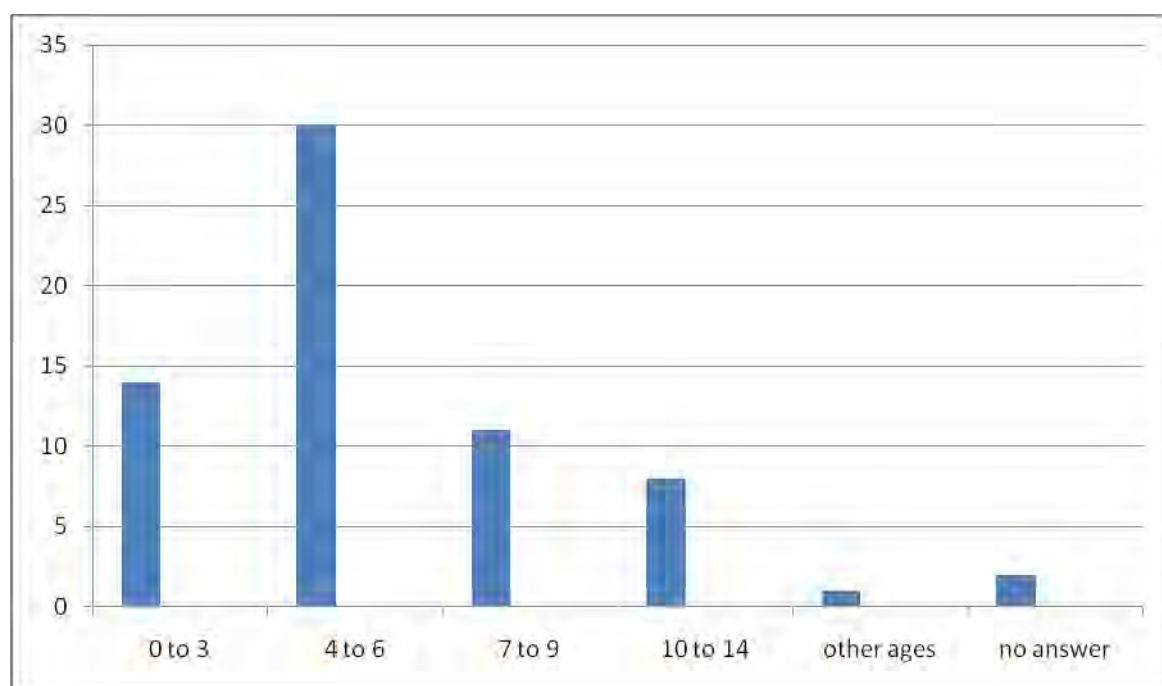
During the Beirut International Book Fair 2013, I asked visitors to the Asala Publishers' stand to complete the questionnaires devised for book customers. Many people were cooperative, and as a result I was able to receive sixty-one completed questionnaires. Roughly 28% of the respondents were male and 72% female.

Beirut Figure 1: Age of the Adult



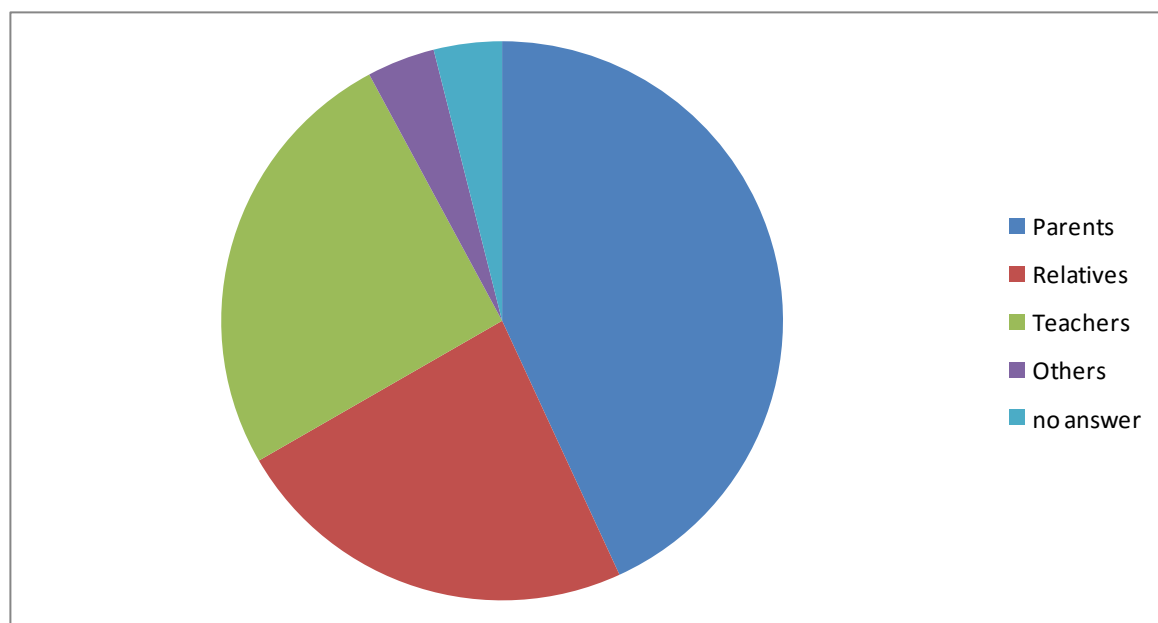
The age of the adults visiting the Asala stand differed greatly, reflecting the variety of visitors to the book fair in general and to the children's book sections in particular. Around 38% of the customers were between 30 and 39 years old, followed by the 26% in their forties, 23% between 18 and 25, while the smallest percentage (around 7%) was of customers over fifty. Ahmad Bazoun, journalist for the Assafir Newspaper, portrays the Beirut International Book Fair as "old", since there is a clear gap in the visitors in the youngest age groups and Bazoun adds that activities for young readers seem to totally disappear in the book fair cultural activities and talks (Arab Cultural Club, 2013, p. 47). Bazoun's "old" remark is reflected in the book fair which seems to look more or less the same every year, where almost each stand and publisher is displaying in the same location again and again each year and the fact that most publishers continue to publish similar titles and attract the same customers. Young people seem to visit the book fair less than any other age group, and children usually visit the book fair with their schools in the morning or parents at the weekend while very few customers in their twenties visit the fair when compared to the older age groups.

Beirut Figure 2: Age of the Children



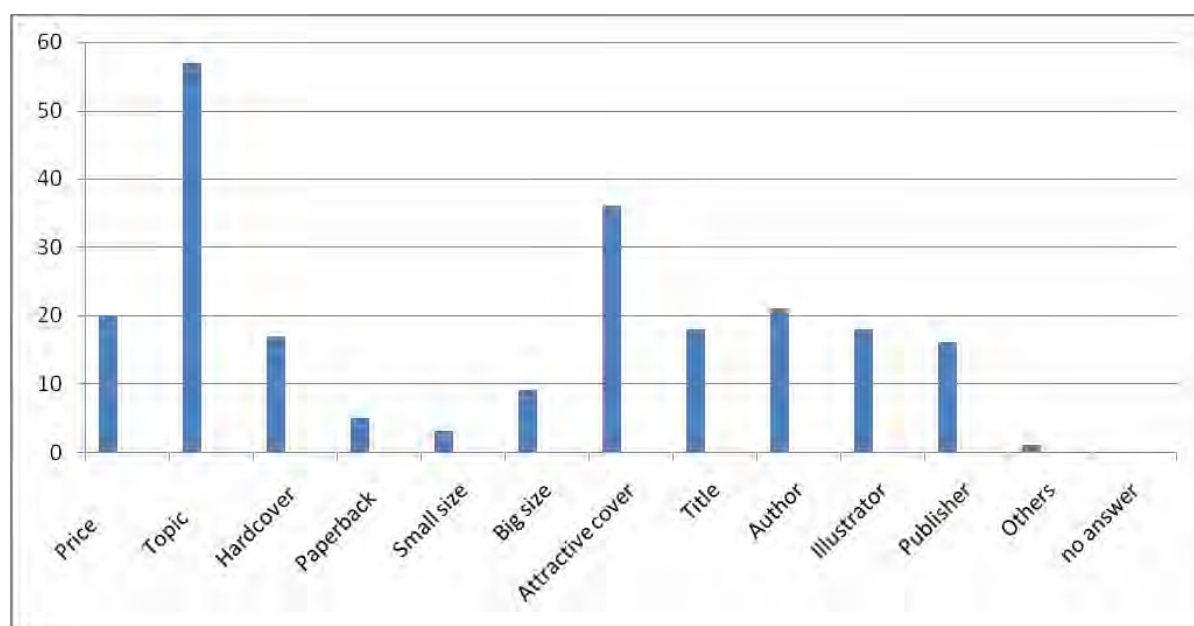
Respondents visit the book fair stand looking for children's books for different age groups. Around half of the customers were looking for books intended for children aged 4-6, while customers looking for baby books (0-3) (23%), or written for older children 7-9 (18%), and 10-14 (13%) were less frequent. The percentages reflect the important role that children's books play in the early elementary years, with the percentages diminishing as the child gets older, and fewer book purchases are made, so the child tends to read less as a result. The purchase percentages are also reflected in the publishers' questionnaire answers in Chapter One, where the largest percentage was for books for children of ages 4-9.

Beirut Figure 3: Relationship to the Child



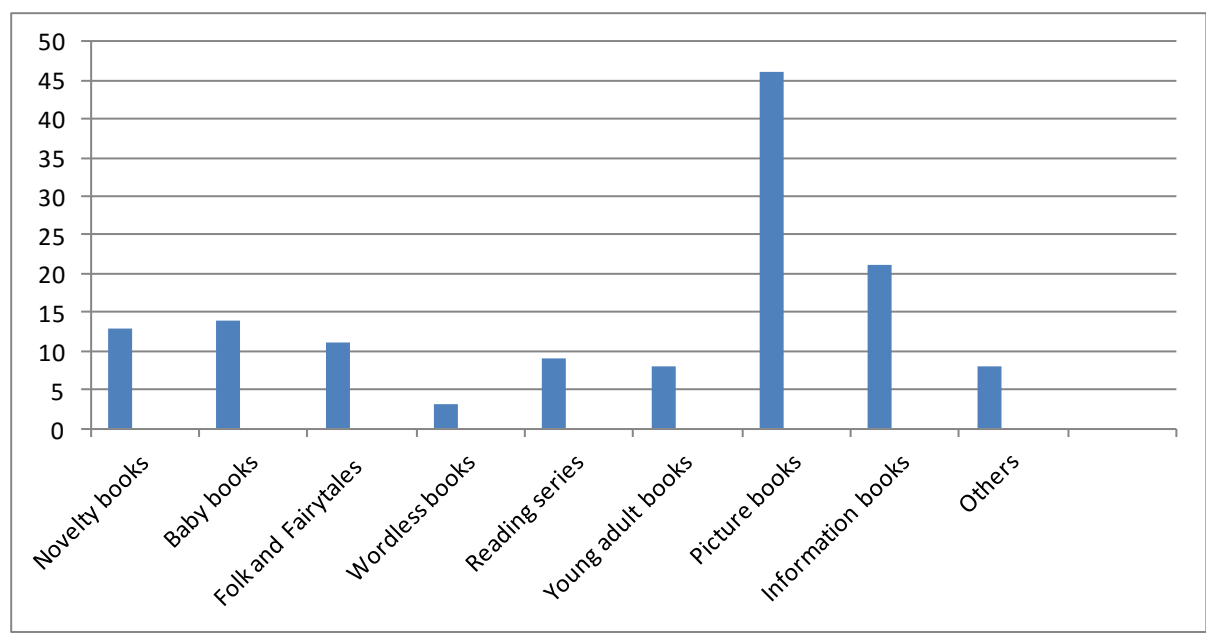
At 36%, the largest single customer group represented parents purchasing for their own children. The second largest group was represented by teachers, at 21%, and other relatives, at 20%. The “other” category included two authors, reflecting the tendency in the Arab World, and especially in Lebanon, for writers to update themselves on their colleagues’ latest titles. The Beirut fair usually features the majority of new Lebanese children’s book titles every year.

Beirut Figure 4: Criteria for Buying a Book



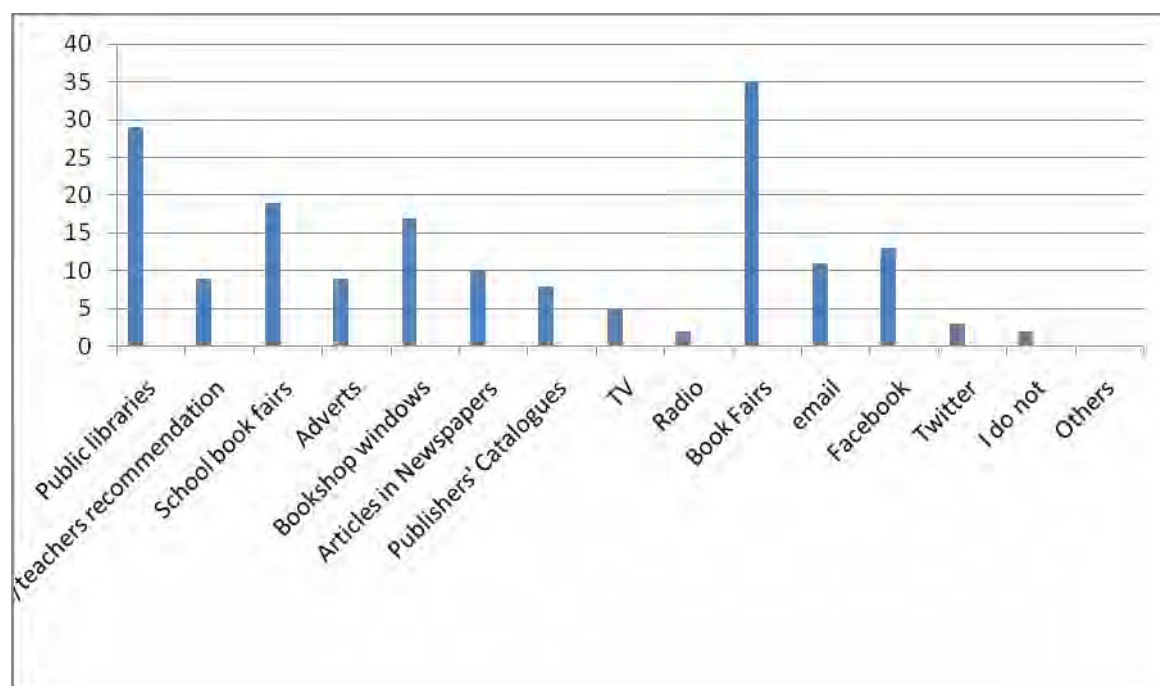
Customers chose more than one option when asked about their criteria for buying books. The majority of the respondents' (93%) purchases were affected by the "topic" of the book and 59% by the attractive cover, while price played a role in 32% of the respondents' decisions. Illustrator, author, and title were chosen as criteria by between 30-35% of the respondents, which suggests a more sophisticated approach for customers with an awareness perhaps of the authors' other works. This might be a move towards the beginning of the perception of the 'author' as a brand. Size was rarely selected, giving it a less prominent role. Other answers included the behaviours a book encouraged, such as accepting or respecting other people. This choice shows that customers seek values in children's books. Figure 4 highlights the diversity of criteria that customers use to choose books, while the majority stressed the importance of "topic". The wide range of options selected by customers in Beirut International Book Fair reflects the nature of the cosmopolitan and sophisticated market.

Beirut Figure 5: Kinds of Books



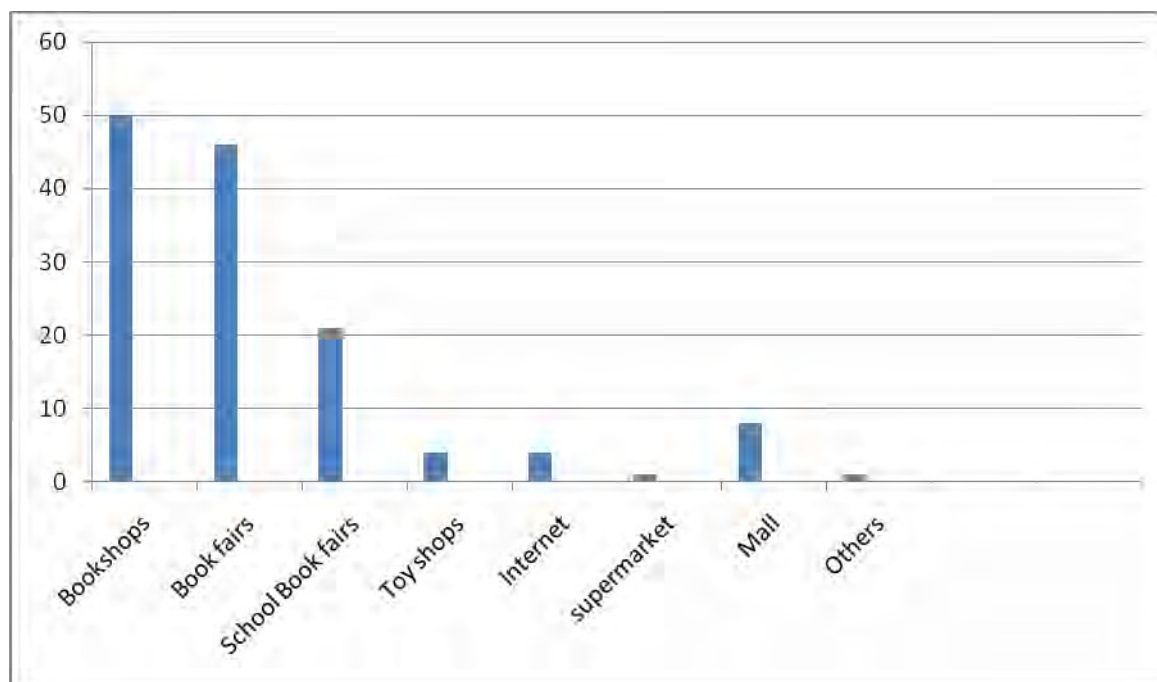
Approximately, 71% of respondents wanted to purchase picture books. 22% of the parents wanted to buy baby books, and 34% looked for information books. Fewer respondents chose graded reading series, wordless books, and young adult books. Only 13% of the customers wanted to buy young adult books, which matched the number of customers with children in this age group, going back to Beirut Figure 2, (which was eight for both answers). Other categories included poetry, behaviour books, and accepting others (which adds to the importance of topic of the book that the customers intend to buy regardless of the genre).

Beirut Figure 6: How Do You Find Out About New Children's Books?



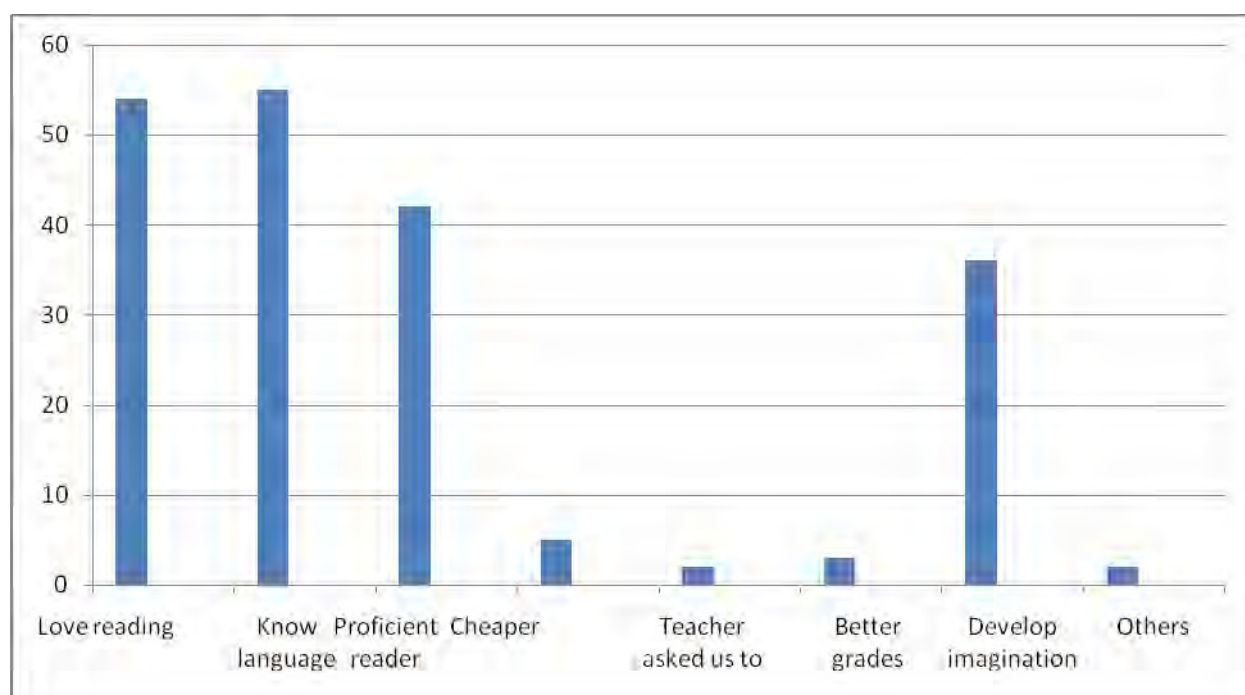
Children's books in Lebanon can be found in bookshops, are marketed online by publishers, displayed in book fairs (some of which are put on by schools), and are rarely promoted by media. Customers visiting the Beirut International Book Fair were asked how they heard about new children's books. 57% of customers find out about new books in book fairs, highlighting the role of the book fair in selling and promoting books. Bazoun points out that many people (who used to attend the book fair not only to buy new books, but to be involved in the cultural activities), now tend to be busy (Arab Cultural Club 2013, p. 46) highlighting the role that the book fair plays in marketing and sales of books as well as its cultural role. Around 46% of customers chose public libraries, reflecting the spread of public libraries in Lebanon over the past ten years, reaching now more than 100 public libraries. Twitter, radio, and TV were identified by few respondents as sources of new book information, reflecting the fact that very few programmes on radio and TV promote children's books.

Beirut Figure 7: Where Do You Buy Your Books?



The majority of respondents visiting the Beirut International Book Fair buy their books from bookshops and book fairs. However, the fact that the questionnaires were answered by book fair visitors might skew this question. That being said, the results from the figure above support the conclusion by both Hashem and the CRI about book fairs' importance as selling outlets and for the marketing of new children's books, discussed previously in Chapter One. School book fairs, as discussed in Chapter Two, are becoming very popular in Lebanon and are hosted by many private schools, with the results in Figure 7 highlighting their position. Very few respondents chose malls, which reflect the fact that many malls in Lebanon do not have bookselling spaces. Bookshops find that the retail rental space is too expensive for them to make a profit. Supermarkets were not mentioned by any respondents, highlighting their weak position in the Lebanese market, in contrast to their importance to the UK market, discussed in Chapter Six. Few respondents buy books online while according to the MasterCard survey on the 21 April 2015, "59% of the survey respondents in Lebanon accessed the internet for online shopping in 2014". The MasterCard survey results in Lebanon specify that respondents accessed the internet for online shopping but do not specify if online purchases have been made. The respondents who chose "others" mentioned publishers, which is sometimes common in Lebanon since customers can come directly to a book publishers to buy books, particularly if they have a previous relationship with any employees in the publishing house.

Beirut Figure 8: Why Do You Buy Arabic Children's Books?



As discussed in the Literature Review and Chapter One, the Arabic language is taught in schools in addition to another language, either French or English. Salman points out that if one looks closely at the “identity” of the schools bringing children to the Beirut International Book Fair, it is possible to discern a trend in favour of teaching in English and French (Arab Cultural Club, 2013, p. 41). The teaching of Arabic is still traditional (as discussed in the Literature Review), and many teachers encourage parents to read Arabic children's books with their children to develop their language proficiency levels. Figure 8 reflects these results, since 90% of customers chose “know the language” as a reason for buying Arabic children's books. 89% of customers buy children's books to encourage children to love reading, and 69% hope that books will help children become proficient readers. 59% of children's book customers buy books since they develop the child's imagination. Very few customers chose “cheaper,” “teacher asked us to”, and “better grades” as choices for their purchases. “Others” included “fun” and “useful: clarifies ideas.”

Conclusion

The results from the customers' questionnaire in the Beirut International Book Fair supports the research findings discussed previously in Chapter One. The majority of the respondents visiting the book fair to buy children's books are parents in their thirties, buying for children between 4-6 years old. Few customers buy young adult books and the

majority of respondents buy picture books for children at their elementary level of education. When compared to the Lebanese publishers' questionnaires results, these results also reflect the importance of publishing picture books for children between the ages of 4-9. Book fairs for Lebanese respondents are the main source for buying and learning about new titles, while public libraries in Lebanon also play a role in presenting new books to the public. "Topic" is one of the main criteria that help customers in choosing their purchases. The teaching of Arabic is important for customers.

Lebanon is a relatively small children's market, with a population of around five million, a suffering economy, and many publishing houses that produce books that are sold all around the Arab World. For many publishers, the Beirut International Book Fair might not yield sales as high as the fairs in other markets (previously discussed in Chapter Two), but many publishers regard their presence in the book fair as a reflection of their status in the market, which in turn is reflected in the stand location and size. The political and economic climate in Lebanon undoubtedly impacts the success of the annual book fair, and a lack of prospects for immediate improvement in these areas shapes the market in general. Tamim stresses that the Arab Cultural Club aims to light a candle so that the candle of knowledge remains lit at all times, and let millions of flowers flourish in our lives (Arab Cultural Club, 2013, p.4). Salman stresses the importance of noticing that the Lebanese is known to be a non-enthusiastic reader, which is reflected in the sales of the book fair that are still lower than expected: many "viewers" and few "buyers" (Arab Cultural Club, 2013, p. 41). Salman adds that the Lebanese, who are stereotypically perceived as keen purchasers of expensive brand clothes and only eat in expensive restaurants, turn into tough and stubborn negotiators when it comes to purchasing books and cultural products (p. 41). Fida Dabbous and Reem Ayoub, journalists from the *Albinaa Newspaper*, stress that the book market's precarious situation is a reflection of the average person's preoccupation with basic economic problems (Arab Cultural Club, 2013, p. 59). The Beirut International Book Fair is greatly affected by the domestic state's instability which makes the Beirut market different from other markets. The unpredictability of the Lebanese economy influences the Lebanese book market negatively because there is little change or investment in development of Lebanese publishing.

Tunis Annual Book Fair

Introduction

Tunisia Information – Table 2

	Population	GNI/year	Libraries	Bookshops	Price of loaf of bread	Price of milk	Basic cost of living(electricity, water, garbage...) of 85sqm apartment
Tunisia	10.5m	\$4,160	369	19-188	\$0.15	\$0.59	\$56.61

Tunisia, located between Algeria and Libya on the North African Mediterranean coast, has a population of 10.5 million citizens. The average annual income per capita in Tunisia is over US \$4,160 and the minimum monthly legal wage for a 48-hour week is around US \$207.064, which is much lower than in the Gulf Arab states and the basic costs of living in Tunis are relatively low. Tunisia currently suffers from a 20% unemployment rate (MEED, 2011, p. 22). Essebsi and Mbazza note that “Tunisia remains a leader in the Arab world in promoting the legal and social status of women. A Personal Status Code was adopted shortly after independence in 1956, which, among other things, gave women full legal status (allowing them to run and own businesses, have bank accounts, and seek passports under their own authority)” (Essebsi and Mbazza, 2011). In addition, the government’s promotion of female education has produced high numbers of women in universities, where half of the students are women, and in law, where 66% of judges and lawyers are women. The Tunisian educational system has nine years of compulsory schooling, which has resulted in an overall literacy rate of 74.3% (Male 83.4%; Female 65.3%).

Like those in other Maghreb states, Tunisians speak both French and Arabic with an emphasis on French. Comito describes the impact of French on the Tunisian publishing market as a market suffering from “colonial structures” due to French language and cultural dominance. The predominant Tunisian writers are attracted by French publishers “where they are ensured a more effective distribution,” while Comito adds that “the publishing industry in the Maghreb covers more of the francophone market than the Arab one, with the result that the production in Arabic receives much less attention” (Comito, 2011). The Tunisian market is thus highly influenced by the French language, affecting

both the use of spoken Arabic and written Arabic. Comito (2013) asks a major question for the readers, and indirectly gives the answer to the situation, writing “[w]hat space is left for the production in classical Arabic (*fusha*) in a country where the majority of the people speaks in French or in *darija*, the dialect?”

It was hard to find statistics about the number of bookshops in Tunis, but www.xyzspot.com gives addresses and details of nineteen bookshops in Tunis (*Tunis Bookstores*, 2015), while *Les Page Maghreb* mentions 188 “libraries” (French bookshops) which include shops selling stationery and/or newspapers (*Annuaire Libraries Tunisie*, 2015). In addition 369 public libraries in Tunis, 29 of which are mobile libraries, promote reading through several activities to its 179,722 members, 51% of whom are students (Alyaseer.net, 2007).

The rights and position that women have in Tunisia and the spread of public libraries (one of the highest number in the Arab World) differentiate Tunisia from any other Arab country. Tunisia is also opened to cultural events including the book fair.

The Tunis International Book Fair is one of the main book fairs held in Arab cities. It is held yearly with support from the Tunisian Ministry of Culture. The 12th annual International Tunisian Book Fair opened on November 2, 2012 and featured Egypt as a guest of honour, with a focus on a series of special events highlighting Egyptian literature. Abbas writes that “this was a catch-up session, as last April's book fair was postponed due to security concerns following the January 14 revolution” (Abbas, 2012). The book fair had a selection of activities during the day, ranging from roundtable discussions to book signings, lectures, and workshops.

Of the 317 publishers displaying their books, 112 were Tunisians, eighty-five Egyptians, forty-three Lebanese, twenty-nine Syrians, fourteen Saudis, four Kuwaitis, and one Emirati. Although there was not a special section for children's books, the aisles displayed multiple specialties. The number of publishing houses displaying in the book fair reflect the low purchasing powers that the Tunisian customers have since more Egyptian and Tunisian publishers are displaying than Lebanese. Abbas (2012) noted that despite its role as host,

Tunisian literature was the present-absentee! There were only a few new books and names, and these mostly focused on the revolution, reflections and feelings from the street, and analysis from new writers about Ben Ali's, [second president in Tunis from 1987-2011], time. There were also many old existing titles about the modern history of Tunisia (the independence and the after-independence).

Many publishers either did not attend or displayed on smaller stands due to the overlap with the Sharjah Book Fair in the UAE. According to Abbas (2012), the “general atmosphere (a political mess plus the economy’s problems)” affected the book fair in terms of sales and presence.

According to the Tunis fair’s website (www.foiredulivre.nat.tn, 2014), the event’s organizers had multiple aims. These included raising awareness about the book industry, giving the public an opportunity to view the latest Tunisian and international titles, promoting reading, networking for publishing professionals, facilitating copyright exchanges, and promoting international cooperation in book production and distribution.

Many people doubted whether the book fair could attract enough visitors given Tunisia’s unstable post-revolutionary situation. Comito (2013) asked “Ok, but what public? With the country shaken by attacks and protests, and blocked in a political impasse, one wonders how many Tunisians will find the time (or will be willing) to visit the stands of the fair, which now celebrates 30 years”.

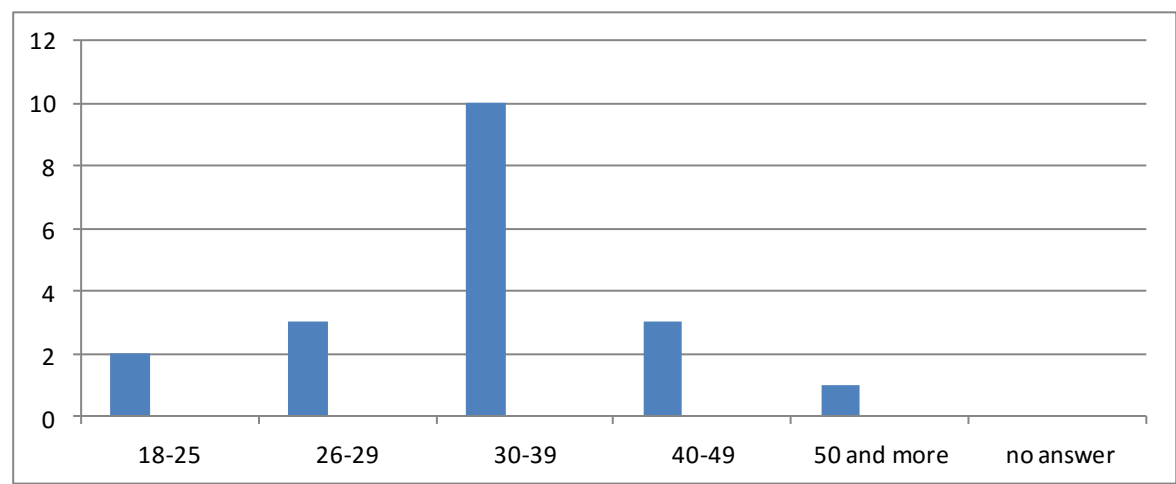
In Tunis Asala Publishers’ books were placed next to a religious book distributor, which limited the traffic at the stand since many visitors were sheikhs with minimal interest in children’s books. Unlike the Asala Publishers’ experience at other Arab book fairs, children did not attend with their schools but visited in the afternoons with their parents. The book fair was busy, but at the same time not very well organized in terms of publishers’ distribution (children’s book publishers placed next to each other for instance) and the presence of stands selling products other than books.

Arfaoui observed that “the bestsellers, however, were books about religion and political Islam. Some sold out on the first days, including *The Reply of Tunisian Ulemas to the Wahhabi Al Saud*” (Arfaoui 2013).

The Experience of Questionnaires:

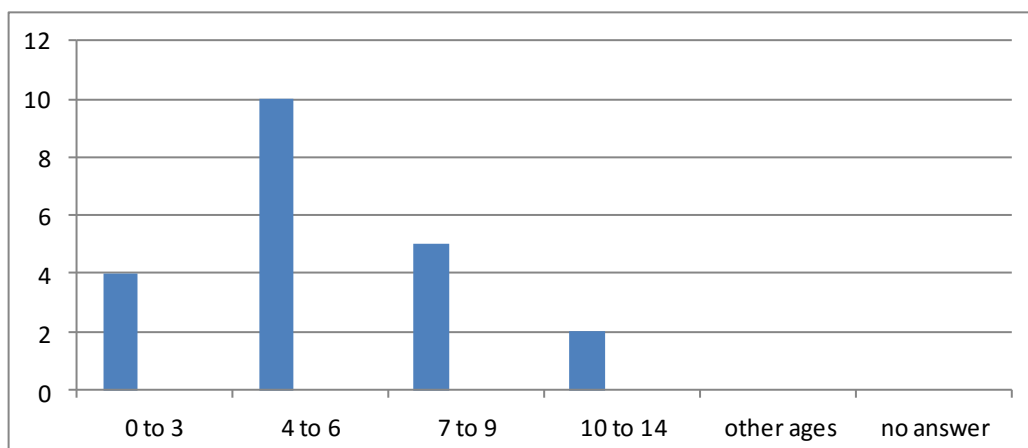
I was able to complete twenty-two questionnaires in Tunis International Book Fair. Many people refused to complete the questionnaires, while the few who did were quite helpful. Teachers usually visited alone during the weekends, while children came with their parents.

Tunis Figure 1: Age of the Adult



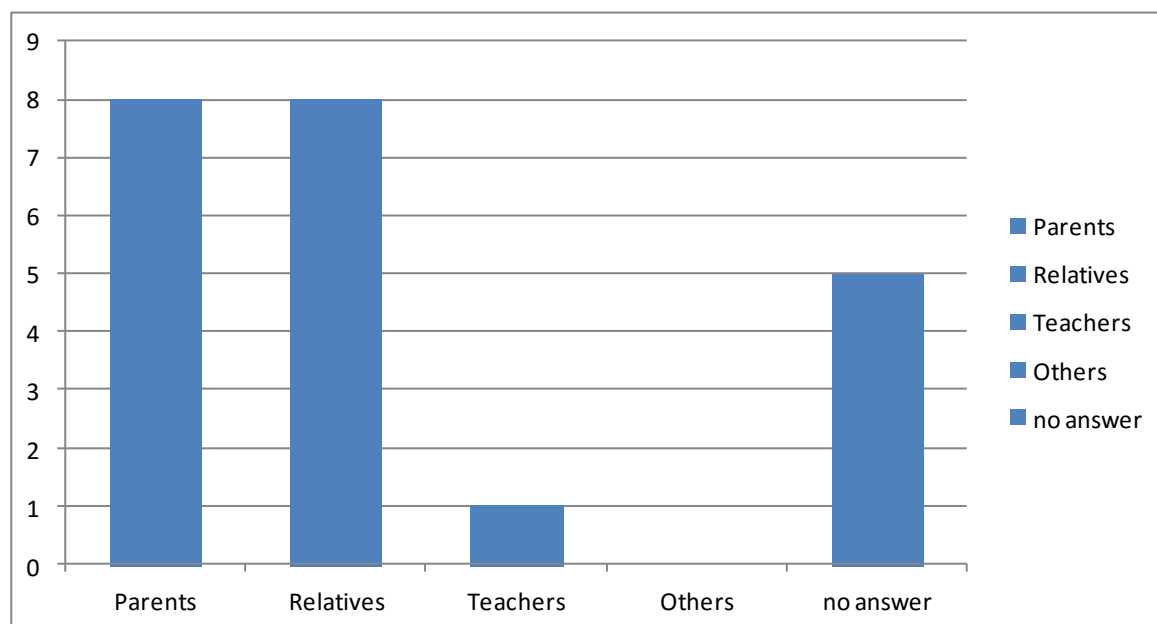
Sixteen of the respondents were females and six were males. Approximately 45% of the people answering were between the ages of 30 to 39, while an additional 45% were almost equally divided between the 18 to 25, 26 to 29, and 40 to 49 age brackets. This is due to the fact that women in the Arab World are the main caregivers for children and women handle the children’s main needs in addition to the fact that most teachers are females too. This might have also been influenced by the fact that the person conducting the questionnaire was a female, likely attracting more women and discouraging highly religious men.

Tunis Figure 2: Age of the Children



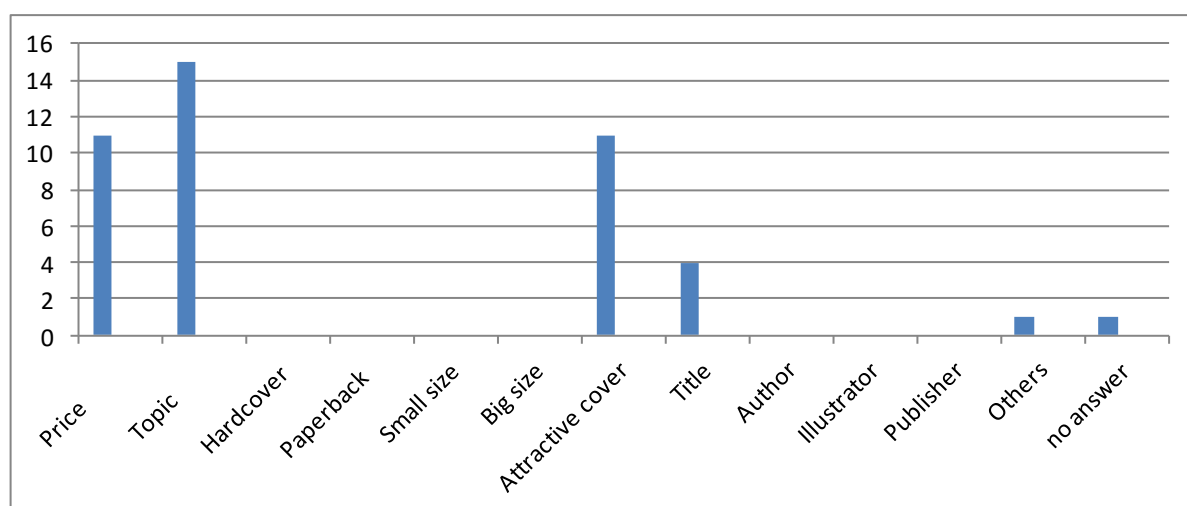
Most of the books purchased were for children between the ages of 4 to 6. Approximately 45% of the people filling in the questionnaires were buying for this age group, while around 22% were buying for children between the ages of 7 and 9. Less than 10% of purchases were for children between 10 and 14. These numbers verify the concentration of books published in the Arab World for the ages 4 and 9, and the less attention paid to older children. Around 18% were buying for children younger than three, which is an area publishers seldom target.

Tunis Figure 3: Relationship to the Child



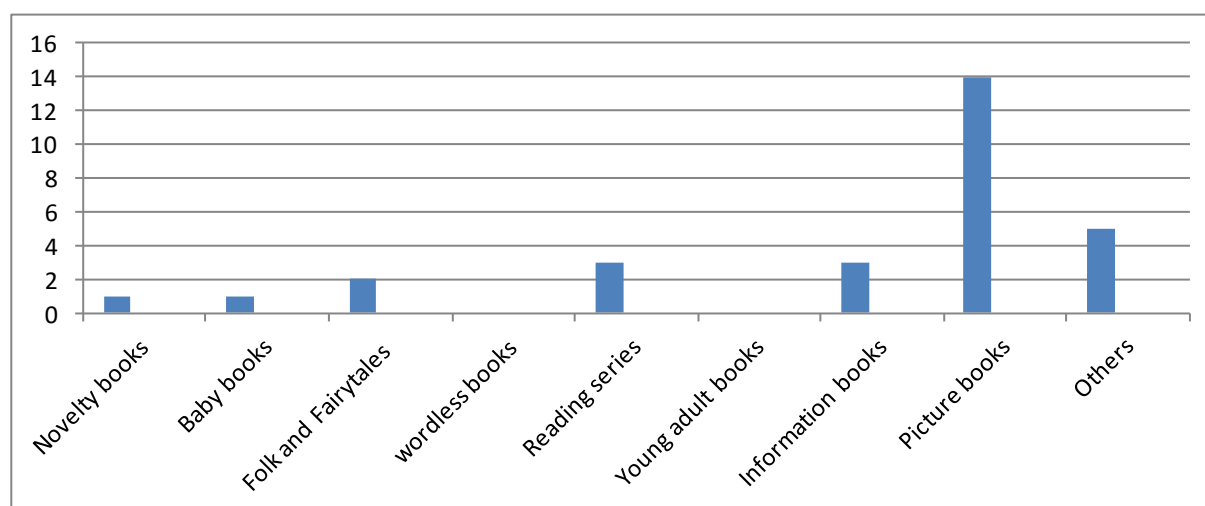
Around eight of the respondents answering the questionnaires were parents, eight other relatives, five did not answer, and only one teacher answered our question. The presence of the stand next to the religious books might have affected the visitors, since most of the school teachers might go to the areas with more children's book publishers, while parents and relatives visited the different halls in the fair to buy books for themselves. The timing of the book fair, at the beginning of the school year in October, might have limited teachers' attendance. Some relatives specified their relationship to the child: one grandmother, one sister, and two aunts.

Tunis Figure 4: Criteria for Buying a Book



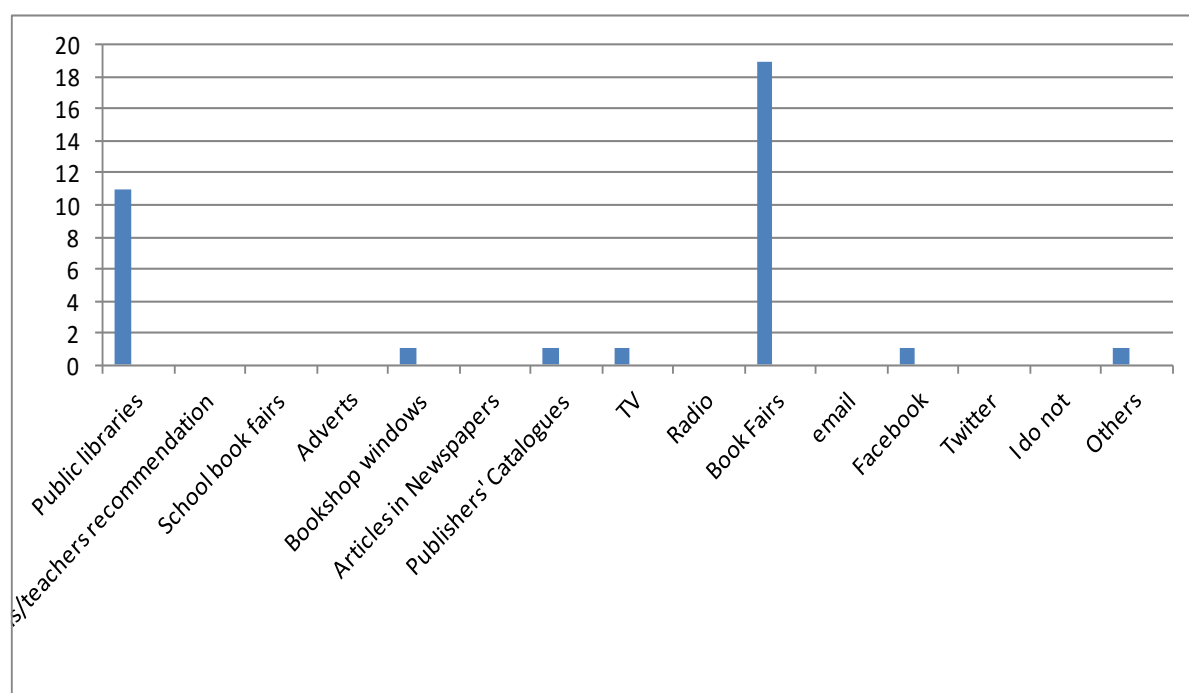
When people were asked about the criteria they followed to choose children's books, many selected either one or a maximum of two choices. Around 68% chose "topic", 50% chose the "price", 50% for the "attractive cover", and 18% chose the "title". Format, size, author, publisher or illustrator seemed to play no roles. One survey-taker mentioned a clear font with punctuation (which is extra small signs that are placed on Arabic letters to be read clearly). "Topic" is a main criterion in choosing books in the Arab World because of concerns about the kinds of material children are exposed to from books ("topic" will be discussed in more details in Chapter Five). Pricing was especially important due to low Tunisian disposable income and the country's economic problems.

Tunis Figure 5: Kinds of Books



When asked about the kind of books that they prefer, most respondents made only one choice. Approximately 64% of the respondents chose picture books as the kind of book they would like to purchase from the fair, while 14% chose information books, 14% graded reading series, 9% folk/fairy tales, and only one each chose novelty or baby books. No one chose young adult books, which is an area in which publishers are investing minimally. Five people answered “others” and included: activity books, colouring books, and books with different shapes. The results highlight the importance of picture books in the Tunisian market.

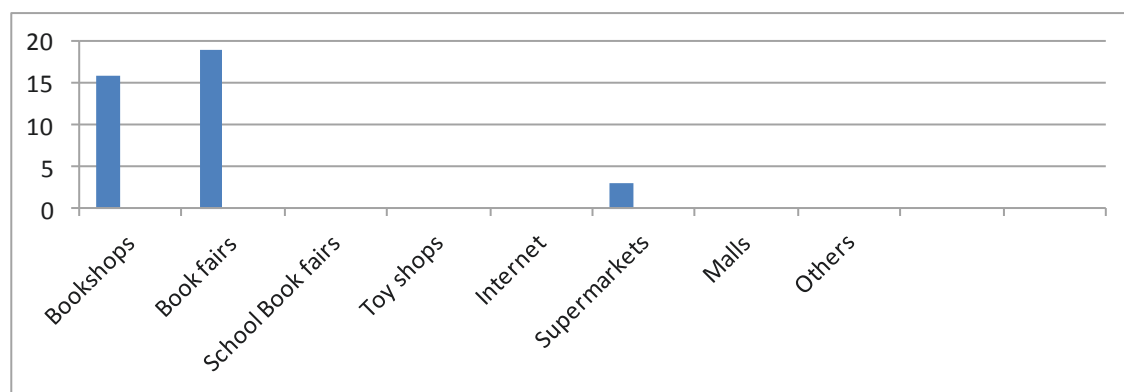
Tunis Figure 6: How Do You Find out About the New Children's Books?



86% of the respondents knew about the latest books published from book fairs and 50% knew from public libraries. This again emphasized the importance of the role of the book fair in the Arab World as a medium for presenting and selling new books. Asala Publishers' major sales in the Tunisian market are mainly to the Ministry of Culture, which each year buys books for their public libraries in the country (highlighting the role of public libraries in presenting new titles to the Tunisian readers). In addition, around 9% of the respondents chose television as a source of information about the latest titles. Only one person selected Facebook as a source, while another chose "publishers' catalogues", and another chose "bookshop windows". One respondent filled the "others" category with "Google" as a source of knowledge about the latest books published reflecting the possible role that online browsing might play in knowing the new titles. Public libraries are significantly important in Tunisia. However, our experience with the Ministry of Culture presents a different angle, since they do not always buy the latest books, instead preferring older titles.

Facebook and social media are gaining importance in Tunis: "Recently, the communication of information has been vital to the success of the Tunisian revolution, and Facebook was its main 'catalyst'" (Mazrouki et al, 2012). Yet this is not a main channel in promoting books.

Tunis Figure 7: Where Do You Buy Your Books?



When people were asked where they bought their books, most of them had more than one choice. Most people, around 86%, bought their books from book fairs, while around 72% bought from bookshops, and 14% from supermarkets. Again, book fairs were a venue for buying books in Tunisia, and interestingly, bookstores were also a more popular venue in Tunisia. However, Comito (2013) mentions that there are a maximum of twenty bookshops in the country, which is a very small number for a country of 10.5 million people. None of the people asked bought their books online, from toy shops, school book fairs, or a mall. Unlike in the Gulf where publishers, bookshops, or distributors organize book fairs in the schools and children buy their own books, school book fairs are not popular in Tunisia.

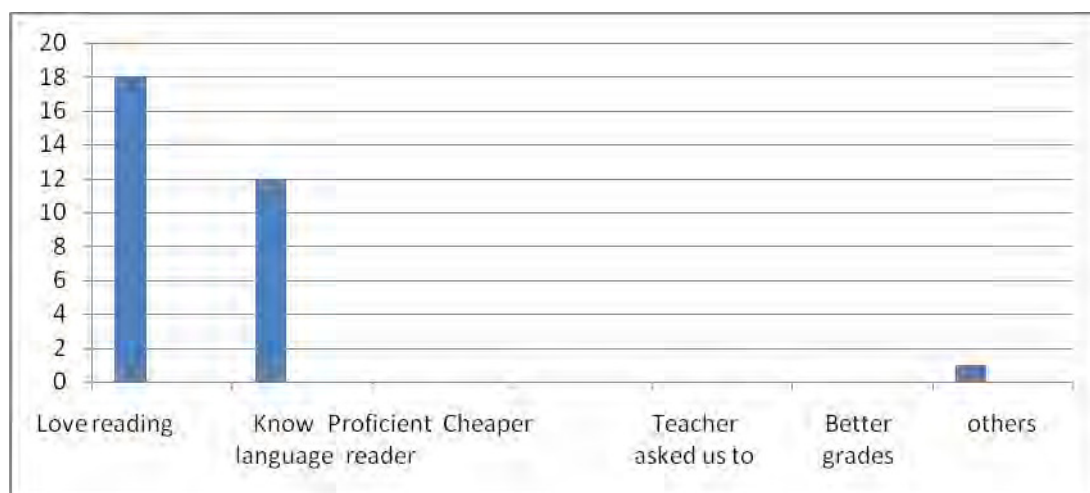
Most respondents chose one or a maximum of two choices. When given the option to rank their choices, book fairs and bookshops were often the first or second choices. In addition, supermarket was chosen alone in some cases.

None of the people asked bought their books online. In addition, according to our experience as publishers we have never been asked for purchases online from Tunisian buyers. In her research about electronic banking, Azouzi (2009) emphasizes the importance of the:

technological revolution [where] Tunisia has invested enormous funds in order to increase the number of online channels and to establish the needed infrastructure. In fact, since 1997, this country has created the National Commission for electronic commerce and electronic exchanges.... according to the Global Information Technology Report 2008-2009 (ApiNews n°3/2009), classified as the 38th country using information technology in the world (among 134) and to remain the leader in Africa by succeeding to be the 7th one in the Mediterranean.

The technical revolution is not yet reflected in the habit of buying online and trusting online channels in the non-Gulf States region. This is an area that might develop in the future, particularly since the technological advancement is available.

Tunis Figure 8: Why Do You Buy Arabic Children's Books?



Around 81% of the respondents buy children's books to promote the love of reading. Around 55% of the adults want to help their children in developing their knowledge of the Arabic language. These were the only two answers given by survey respondents, while only one person mentioned the fun of reading. In Arfaoui's (2013) interviews with book fair customers, one parent said: "I came with my children to acquire some books that can shed light on some of the issues of concern in our daily lives". The results highlight the two main roles that children's books have in Tunisia where books are mainly being used and purchased to promote the love of reading and develop the knowledge of the Arabic language.

Conclusion

Tunisian children's book customers are mainly mothers and other female relatives shopping for children aged 4-6 years, and looking for "topics" in picture books that can help the child love reading. Tunisia has been dealing with political changes and economic problems. In addition, the Tunisian market is difficult to sell to, especially for Lebanese publishers since their prices are much higher than both Egyptian and Syrian companies. Perhaps testing the market with special lower-priced editions can be tried.

The way books are sold and marketed in Tunisia can be further developed through testing the market in many ways. School book fairs are a major tool used to sell directly to children, and have achieved good sales in many markets. In addition, the habit of children visiting the book fair with their schools can be introduced, tested, and developed in the

market. Bookshops can introduce activities to attract readers and develop the habit of visiting the bookshop. Comito (2013) points out that according to figures published

by *Huffington Post Maghreb* on the reading habits and book circulation in Tunisia, publishing in Tunisia is not in good health. Only 100 titles have been published since the beginning of the year by some 190 publishing houses — though I doubt this number. These books are apparently being distributed by the twenty or so bookshops scattered in the country, but concentrated mainly in the biggest cities. (If anybody has other information, please drop me a line).

Competition among Tunisian publishing houses is very low, leaving space for other Arab and international publishers to advance. However, without proper selling channels and room for development, book sales in Tunisia could be hard.

Tunis has many similarities to the Algerian market, which are highlighted in the customers' book fair questionnaires discussed in the section below.

International Book Fair of Algiers

Introduction

Algeria Information – Table 3

	Population	GNI/year	Libraries	Bookshops	Price of loaf of bread	Price of milk	Basic cost of living(electricity, water, garbage...) of 85sqm apartment
Algiers	35m	\$7,000	NA	NA	\$0.2	\$0.34	\$40

Algeria is a North African country with a population of approximately 35 million (*Algeria Country Review* 2013, p. 1). At approximately US \$7,000, Algeria's GDP per capita is quite low when compared to the Gulf States (*Profile: Algeria*, 2006) with relatively low cost of living too. 4.7% of the country's GDP is spent on education and 5.8 on "health expenditures" (*Algeria Country Profile* 2013, p. 137).

Algeria was placed in the medium human development category, ranking 84th out of 169 countries in the UNDP's the human development index (HDI) (*Algeria Country Profile*, 2013, p. 137).

According to the *Education Encyclopaedia* (2015), due to budget restrictions, it is "difficult to assess the library resources" in Algeria. The *Education Encyclopaedia* (2015) stresses the role of cultural centres in developing children's libraries due to the minimal number of school and public libraries.

Some cultural centers are developing children's libraries. Student use of libraries in cultural centers is high. In Oran, Algiers, and Constantine, there are an estimated 50 readers for every reading location. School libraries are poor or non-existent. No specific budget is allocated to libraries in Algerian schools. Few public libraries have children's sections, as loaning books to children is unlikely. There are no specialized bookshops for children's literature; few keep a section for children's reading. No publishing house specializes in this field. There is no listing of Algerian writers of children's books or systematic advertisement of children's books. (*Algeria Higher Education*, 2015)

Algeria is a developing country with small budgets allocated to public libraries and educational development. The fact that there are few bookshops and public libraries highlights the role of the book fair in presenting and selling books to the public. The Ministry of Culture in Algeria combines the results of both bookshops and public libraries

presenting sixty-seven of both without specifying (*Algerian Libraries*, 2015). It is worth noting that in Arabic both bookshops and public libraries can be referred to as “maktaba”.

Asia Moussi, an Algerian author, divides Algerian readers into two categories highlighting the wide spread and the use of French among Algerians. Moussi points out that

[t]here are two kinds of Algerian readers: the first reads basically in Arabic, and in many cases, this kind of reader has a traditional, religious background. And then there is the reader who basically reads in French: this second kind of reader is more open-minded, but he is saturated with clichéd ideas about Arabic culture and Arabic literary creativity. (Lynx, 2015)

The International Book Fair of Algiers is an annual book fair held in Algeria’s capital and largest city. The September 2011 fair attracted 500 local and foreign publishers who installed 460 booths, of which 320 were international. Roughly one-third of the exhibitors were Algerian, with another one-third from other Arab countries. In addition, Cobban (2011) observed that there was “strong showing from the big French publishers Hachette and Gallimard; and the rest coming from numerous other countries, mainly in Europe”.

The Chinese news agency Xinhua (2011) noted that “[t]he International Book Fair of Algiers is the largest cultural event in the North African nation and one of the major public attractions of the year”. The event was officially inaugurated by Algerian Minister of Culture Khalida Toumi. Cobban (2011) remarked that

it seemed like a huge undertaking-- and one that the government had evidently invested a lot in, seeing it as a strong demonstration both of its dedication to culture in general, and of the fact that the country is now a safe and cautiously "happening" place to be.

Like most Arab book fairs, the International Book Fair of Algiers is intended for the public rather than retailers, with most visitors buying directly from the publishers. Families visit the book fair as an outing to take in attractions such as the several food areas and the festive atmosphere. In 2010 more than 1,200,000 visitors attended the fair.

The fair often gets very crowded, especially towards its final days, and people carrying heavy bags full of books is a common sight. According to Cobban (2011)

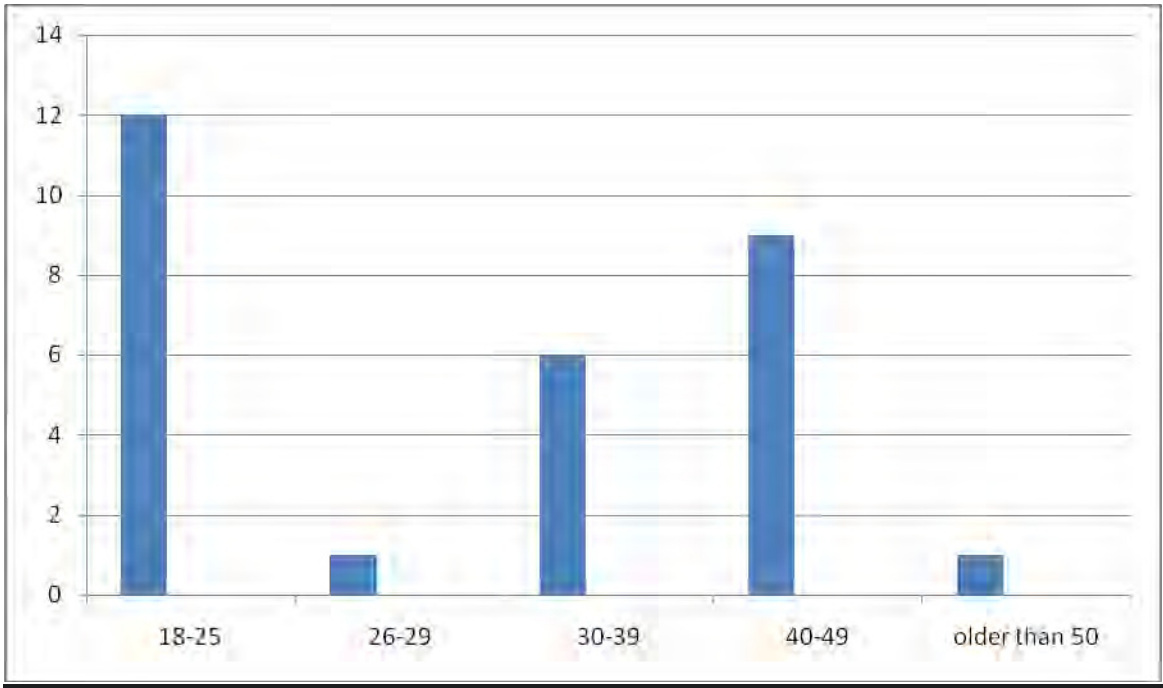
my driver explained that the prices of books at the Fair were noticeably lower than in the regular bookstores, so people would stock up on reading matter for as much of the year ahead as they could. Plus, of course, they could get hold of all these great titles being offered by non-Algerian publishers.

There is no dedicated area for children's books or children's publishers in the fair, and eight out of twenty-one Lebanese children's houses did not make the journey to Algiers. The list of non-participants included Tala Establishment, Yuki Press, and Dar Al-Fikr Al-Lubnani.

The experience of filling out the questionnaires

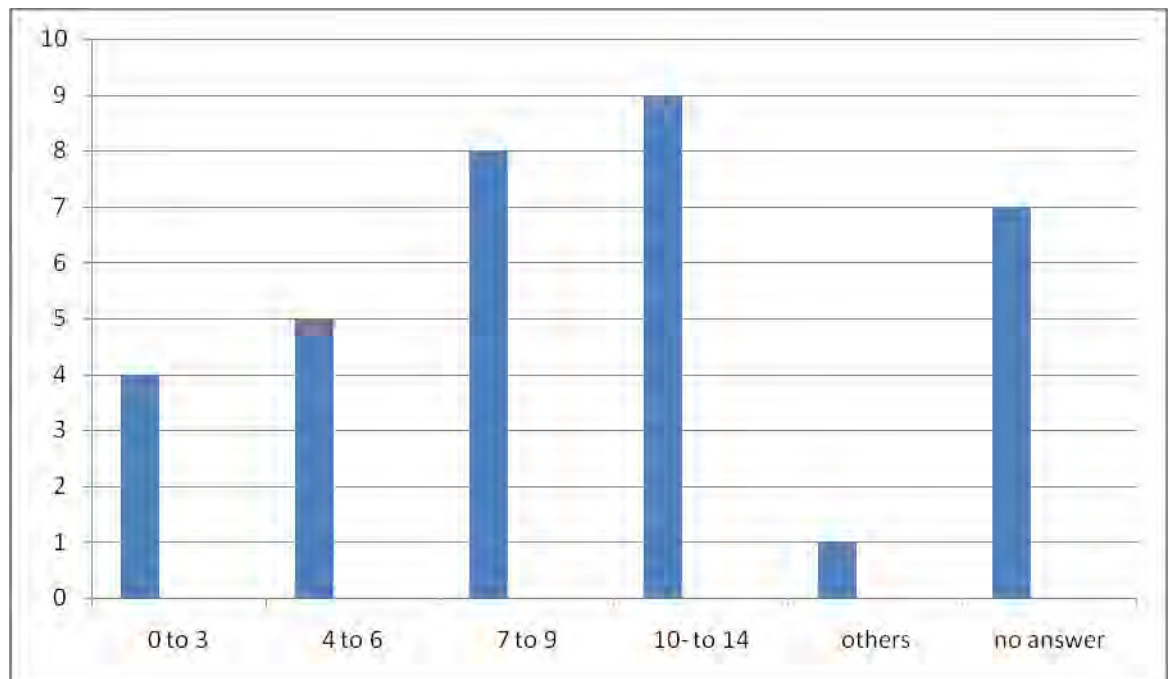
The Algerians were very helpful in completing the questionnaires and discussing the questions. Very few teachers visited the book fair, since it was the beginning of the school year. In addition, children came with their parents and not with their schools. Unfortunately, I was only able to collect twenty-nine questionnaires because Asala Publishers' books arrived five days after the proceedings began. People preferred not to answer some questions that they felt were private, or were not sure of how they wanted to answer, so we received no answers in some areas.

Algiers Figure 1: Age of the Adult



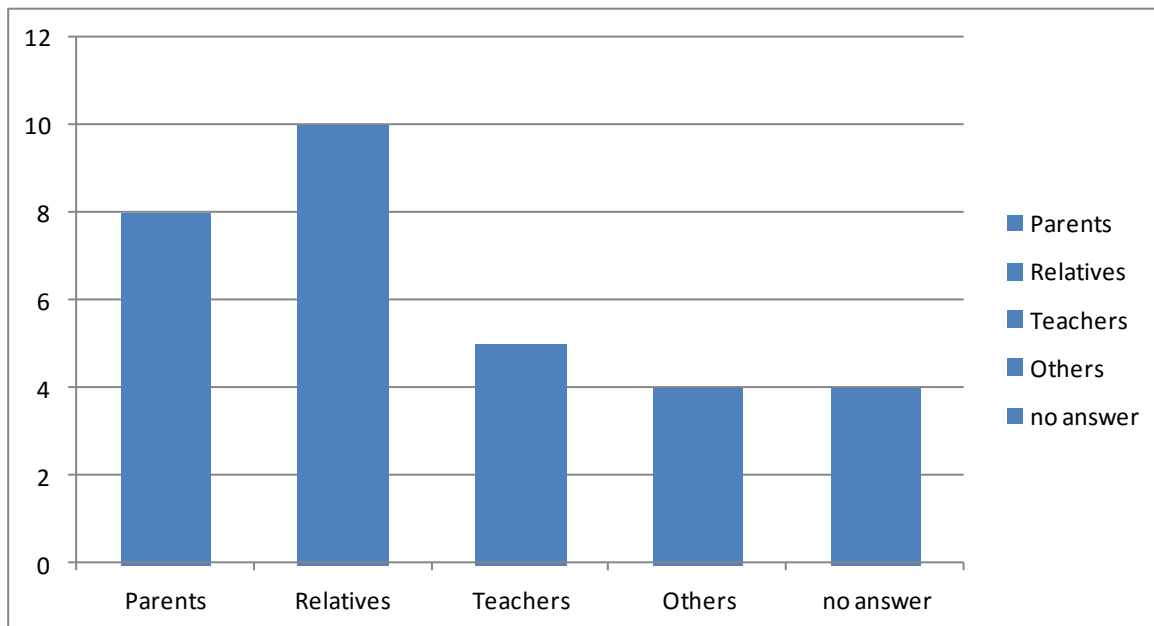
Roughly 38% of respondents in Algeria were male and 62% female, where the latter tend to buy more children’s books. A large percentage of people (41%) were between 18 and 25 years old, while 31% were in their forties. The results highlight the nature of the young female children’s book customer and the role that customers aged 30-50 have in Algeria.

Algiers Figure 2: Age of the Child



The most common age group of children that customers were buying for was somewhat surprising, as the highest percentage of visitors purchased books for children between 10 and 14 years old. This group of children is usually the lightest readers in the Arab World, and very few publishers target them. This might be due to the fact that Algeria is a developing state coming out of conflict; its young adults are not as exposed to technology as much as their compatriots in other parts of the Arab World. According to the World Bank in 2004, forty-six people were internet users (per 1,000 people) while only nine people (per 1,000 people) have personal computers and 98% of households have television (Esau and Khilfaoui, 2004, p. 4).

Algiers Figure 3: Relationship to the Child

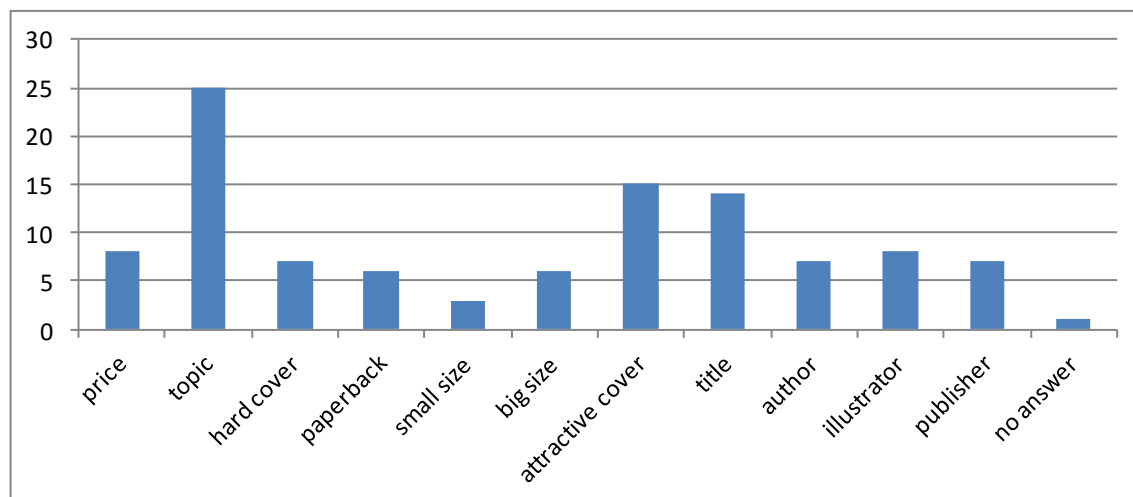


In the “relationship to the child” area, there was also a variety of answers, including parents, other relatives, and teachers. Ten respondents, the highest percentage was of the children’s other relatives. This may be due to the timing of the book fair, since September is the beginning of the school year, and parents and teachers were often busy. In addition, Branine, Budhwar, and Debrah (2001) note that

[t]he social system has been dominated by extended families and communities which protected their members and cared for the elderly and otherwise needy. Strong emphasis is put on the family as the foundation of society.

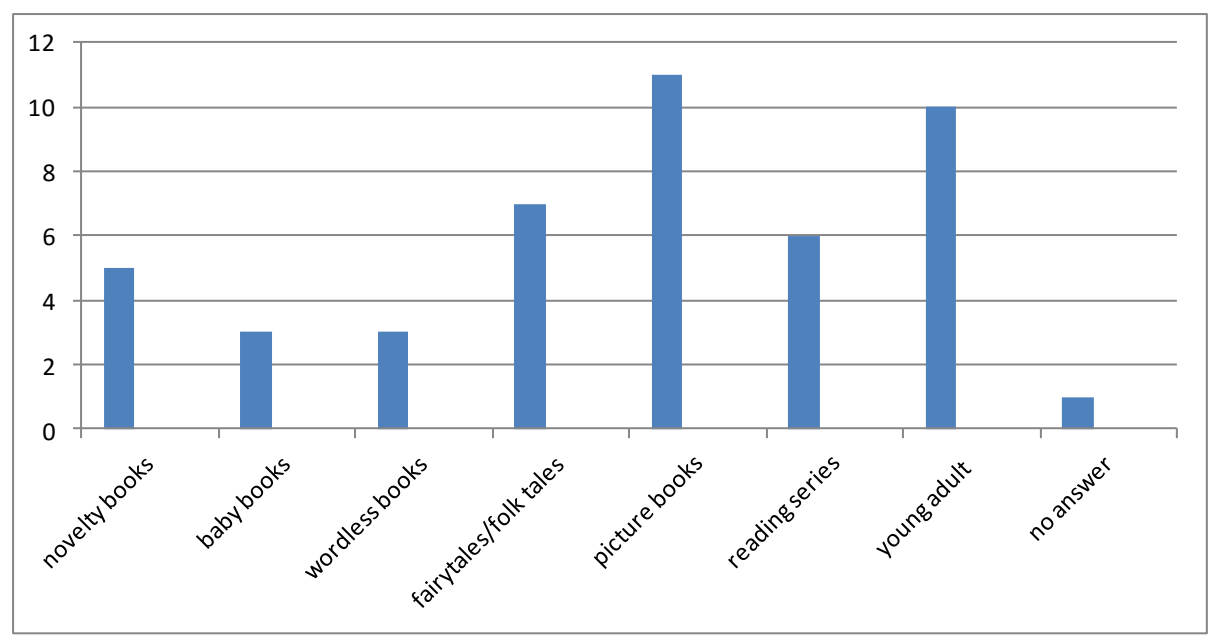
“Others” included someone with a general interest in looking at books, such as someone from a cultural organization, a school principal, or a parent and a teacher at the same time. This might also account for the large percentage for the age group of 18-25, who are likely to be relatives.

Algiers Figure 4: Criteria for Buying a Book



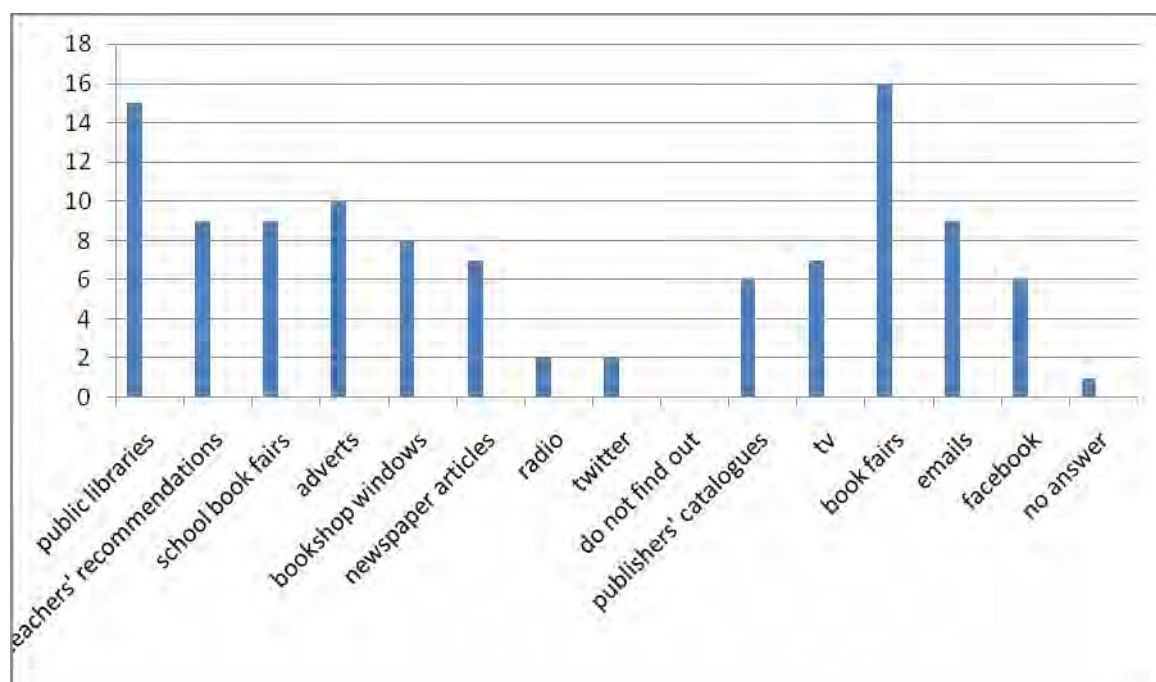
When respondents were asked about their criteria for choosing a child's book, the customers often gave more than one choice. 86% of respondents chose the topic as one of the main criteria for choosing book. In addition, when respondents ranked their choices, the customers selected the "topic" as choice one in most of the papers. "Others" included "attractive colours", "easy ways to teach Arabic", "font", "title and topic", and "cover and topic combined". People in the Arab World consider books as a learning tool; as a result the topic is one of their primary choices. Around 50% chose attractive title and the cover as a choice in Figure 4.

Algiers Figure 5: Kinds of Books



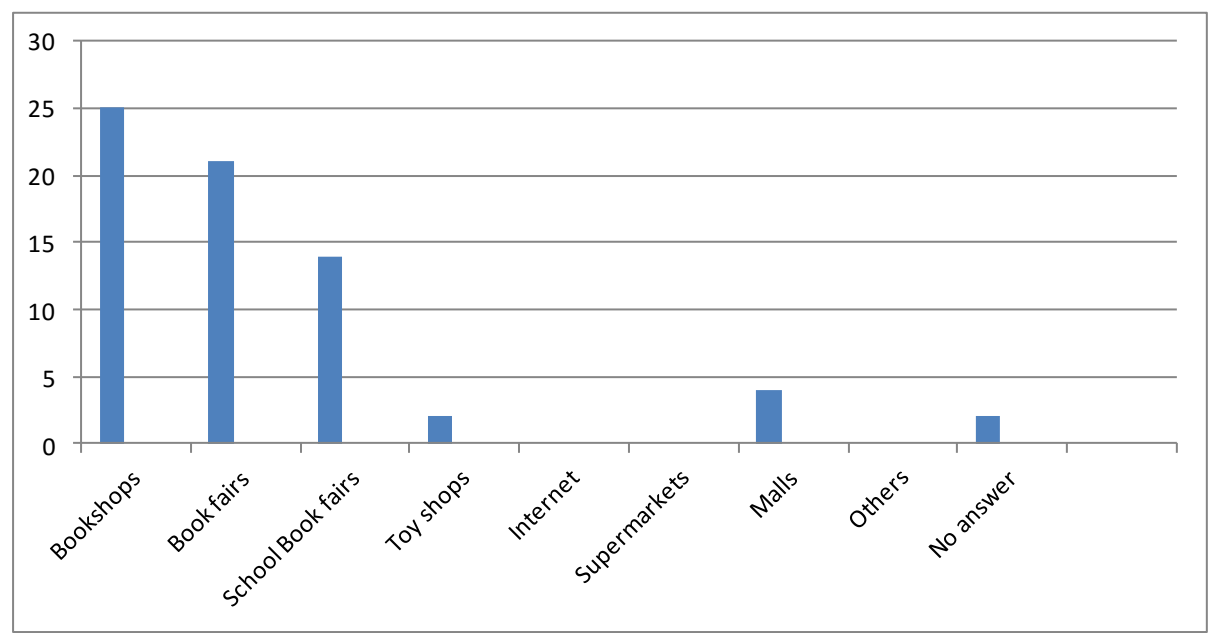
When respondents were asked about the kinds of books they were looking for, the customers often made more than one choice. Eleven of the respondents chose picture books. The number of books chosen for ages nine and above matches the number of adults with children of ages nine and above, at ten. Very few customers wanted to buy baby books, novelty books, or wordless books. The results reflect the importance of picture books and young adult books in Algeria.

Algiers Figure 6: How Do You Find Out About New Children's Books?



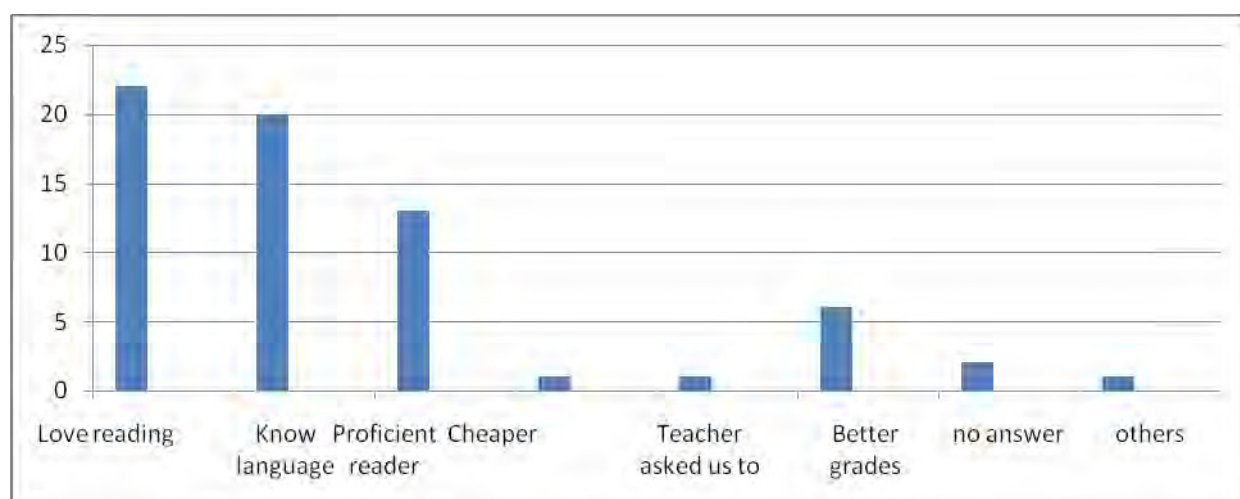
Children's book customers visiting the book fair were asked about how they know about the latest books. Everyone asked seemed knowledgeable about new titles and no one answered negatively. 55% of the people knew about the latest books from the book fairs, while 51% of them knew from public libraries. These results verify the importance of book fairs in the Arab World, and especially in Algeria. As children's books publishers we have never received a public library order from the Algerian government, in contrast to other Arab markets such as Sharjah, Tunisia, and Abu Dhabi. This might mean that people's affirmative answers could include the latest books published by domestic or French companies.

Algiers Figure 7: Where Do You Buy Your Books?



According to the survey results, twenty-five respondents (86%) buy books in Algeria from bookshops and around twenty-one respondents (72%) from book fairs. Neither internet nor supermarkets were selected. This might be due to the slow nature of development in Algeria and the country’s low exposure to technology. In addition, Belkhamza and Wafa (2009) note that “[t]he lean nature of the electronic environment relative to the traditional face-to-face market leads to transaction risks rooted in uncertainty about the identity of online trading parties or product quality”. Like people in most of the other Arab markets, Algerians are not used to and are hesitant to buy online. Algeria was the only market where respondents selected bookshops as their first option for the place of book purchases and not book fairs. The importance of bookshops to the Algerian market can be connected to the French heritage, which was more pervasive in Algeria than in both the Lebanon and the Tunisia (for good or ill), where bookshops were held in high esteem as “guardians of culture”. The results highlight the need to further investigate the Algerian market.

Algiers Figure 8: Why Do You Buy Arabic Children's Books?



When respondents were asked why they buy Arabic children's books, the customers selected more than one option. 75% wanted their children to love reading, about 68% chose "Arabic language skills", and 44% indicated "improved reading levels". The choices of to "help the child love reading" and "improve the Arabic language" held a large lead over "become a proficient reader" in being chosen as first choices where most people listed one of the former two options as their main reason. A small number of respondents chose not to answer the question, and some selected 'because teachers ask us to'. The results indicate that reading for some people in Algeria is linked with pleasure and knowledge of the language. "Others" included "because it is our mother language", the results support the fact that in Algeria "Islam is officially the state's religion and Arabic is the national language" (Branine, Budhwar, and Debrah, 2001). As a result, the teaching of Arabic is crucial to learning about religion and reading the Quran.

Conclusion

Unlike the other Arab markets, Algerian children's book customers are looking for books for children of ages 10-14 in bookshops and book fairs. Like other Arabs, Algerians believe in the importance of topic as a main reason for buying a book to help the child love reading and know the Arabic language. Public libraries and book fairs are the main sources where customers find out about the latest titles. It might be valuable to experiment with new marketing techniques. In marketing to Algerian children's book customers, the target customers are not only the parents, but the extended family due to its importance in Algeria.

Although Algeria is still a small market and a closed country for many publishers due to the strict rules that the government has placed on transferring money and shipping books, the Algerian market is an important one in many ways. First, Islam is the main religion and the teaching of Arabic is essential, even though “Algeria is the second largest francophone country in the world,” as Lloyd notes (Lloyd, 2002). Second of all, Branine, Budhwar, and Debrah (2011) observe that “Algeria is potentially one of the richest countries in North Africa because of its natural resources of arable land in the north and hydrocarbons (crude oil and natural gas) in the south”. Economic growth is expected in the coming five years, and “IHS Global Insight expects the domestic economy to grow 3.6% in real terms in the medium term (2014–18) and 2.0% over the longer term (2019–42)” (*Algeria Country Monitor*, 2012). Thirdly, according to the UN data in 2008, 27.7% of the Algerian population is below the age of fifteen. Finally, Algerians spend a lot of time watching television, especially with the increased pirated decoding of satellite dishes, as Lloyd notes: “during the 1990s, with little in the way of evening entertainment, Algerians would have spent more time than usual in front of their television sets. They would have been exposed to French, Spanish and Italian television” (Lloyd, 2002). As a result, books translated from French television cartoon characters might sell well in Algeria.

Algeria has a big population, low income rates, and natural resources. The slow development puts more stress on the role of the book in the Algerian market as one of the main sources of entertainment in addition to television. The low income rate makes it hard for Lebanese children’s book publishers to sell in the market. In conclusion, Algeria is a developing market with the possibility of further growth in the future.

The book fair in Algiers is part of the chapter that discussed book fairs in Beirut and Tunis, cities in the non-Gulf areas. All three book fair customers are mainly females looking at the topic of the children’s book and buying books from book fairs and knowing about new titles from book fairs and public libraries.

How are these book fairs similar and different from book fairs in the Gulf States?

The following chapter will discuss and analyse the results from the book fairs in both the Gulf and non-Gulf States markets.

Book Fairs in the Arab World Part 3

Analysis

The research conducted at the book fairs forms the basis of the research finding and will be discussed in detail in this chapter. This chapter is divided into four sections. The first section will compare Arab book fairs to international book fairs in order to understand the nature of the book fairs in Arabic cities. Drawing an image of the setting of the fairs, the chapter will move to section two which summarises the findings from all the questionnaires discussed in Chapter Three and Chapter Four. Section three will include detailed analyses of the results from the series of children's book customers' questionnaires, trying to find links between different factors in the questionnaire results. Section four will compare the results from the Gulf book fairs to those in the non-Gulf region. The section below will discuss and compare the international and Arab book fairs.

Arab Book Fairs and International Book Fairs

International book fairs are usually organized as annual events in which publishers display their books and products, aiming not only for book sales, but also for selling rights, publicity, networking, and marketing. According to Linton et al, "[e]xhibitions are a popular form of field marketing.... [and] are used predominantly in B2B [business-to-business] markets and give organizations the opportunity to meet new contacts, distributors, and customers and see what the competition is offering" (Linton et al., 2009, p. 180). International book fairs can be either trade (i.e. professional) fairs, consumer fairs, or both. The B2B, business to business, nature of trade book fair shapes the fairs where the publishers' stands usually have scheduled business meetings with business partners and not individual customers.

The main trade book fairs are the Frankfurt, London, Book Expo America (BEA), and Bologna book fairs. Visiting such a book fair, one is surrounded by industry professionals from all over the world. In international book fairs, publishers network and meet distributors, bookshop managers, librarians, and government officials responsible for supplying public libraries, and other possible business-to-business customers. Arab publishers travel to the international book fairs to engage with and learn about advances in publishing, make translation deals to translate foreign books, meet new illustrators, and take part in auxiliary events around the fair. In the Bologna and Frankfurt fairs, for

instance, the public gain access at the very end of the fair; priority is given to the publishing trade.

As discussed previously in the Literature Review, the Methodology, and Chapter One, book Fairs in the Arab World are different from these fairs. Eschweiler and Goehler describe book fairs in the Arab World as “crowded book bazaar rather than executive meeting points” (2010, p. 1). The majority of the Arab publisher respondents in the Arab Thought Foundation study for example, stress the importance of taking part in Arab book fairs to sell books to and connect with book readers (2010, p. 328). The Consultation and Research Institute similarly observes that 75% of Arab publishers sell books through national book fairs (2010, p. 83). As discussed previously in the Literature Review, the CRI discovered that 35.3% of publishers’ sales are made through Arab book fairs, making them the largest channel for Lebanese publishers (2010, p. 89).

David Hirsch, UCLA Middle East and South Asian studies librarian, points out that in the Arab World,

[t]he book fairs themselves also function as temporary public reading spaces, of a sort. Although books must obviously be purchased to be taken home, the book fairs are generally open to the public, or in Cairo to anyone who has one L.E. [Livre Egyptienne meaning Egyptian pounds] for the ticket. (Lynx, 2015)

Book fairs are yearly events in most of the Arab capital cities. Management differs at every book fair, as do customers’ preferences and purchases. As a result, publishers’ involvement varies in Arab book fairs with their stand location, number of staff, and titles presented.

Lebanese publishers take part in many of the Arab book fairs discussed in Chapter Three and Chapter Four. The number of visitors, stand location, and sales numbers are important factors affecting the whether a publisher attends in the following year. It is worth nothing that book fair sales and visitors have been increasing in the some Gulf State fairs, mainly the Sharjah International Book Fair in 2014, giving them a leading role. The Sharjah International Book Fair has grown steadily in recent years.

In her article, Maria Lynx (2014) compares some of the Gulf book fairs in terms of visitors and sales, drawing an image of the market:

The Sharjah International Book Fair ended...[it] was the most successful in that city’s book fairs yet, drawing a number of visitors that puts it in league with the mammoth Cairo and Riyadh book fairs in terms of attendance: And in sales, \$48.5 million puts it far ahead of Riyadh’s reported \$19 million. It’s far more than the flashy Abu Dhabi International Book Fair, which this year drew in a reported 248,000 visitors and around \$9.5 million in sales....[B]ook fair director Ahmed Al

Ameri says, “....it was difficult to move from one section of the book fair to another, even more packed than a Friday at the Cairo International Book Fair”. The Sharjah International Book Fair is almost surely the most ambitious Arab book fair: aiming to be a trade fair, a selling fair, a book festival, and a children’s-book festival all in one. It is a gargantuan task, and yet somehow it all came together, one way or another.

Lynx stresses the importance of book fairs in the Arab World, particularly in the Gulf and the position of the Sharjah International Book fair as a leader in terms of visitors and sales.

Table A- Asala Publishers Book Fair Sales 2014

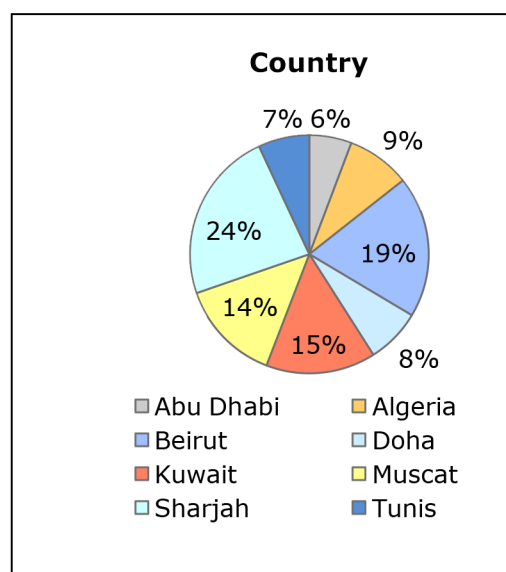
Book Fair	Kuwait	Doha	Muscat	Abu Dhabi	Sharjah	Beirut	Tunis	Algiers
Sales in 2014 in US \$	12,940	17,421	31,865	17,405	28,000	25,666	Less than 1,000	Less than 1,000

To understand and compare sales figures from different book fairs and to give an example, Table A presents the sales results for Asala Publishers in 2014. The sales figures reflect the importance of Beirut International Book Fair for Lebanese children’s book publishers and the high sales figures in the Gulf in comparison to the small Tunisian and Algerian markets. The sales results from Muscat International Book Fair included sales from order by the Ministry of Culture to be delivered and paid during the book fair worth US \$17,000.

Most of the Gulf book fairs generate high sales numbers for Lebanese children’s book publishers compared to the non-Gulf book fairs. When Lebanese publishers were asked in which book fairs they sell the most (See Table 40 in Chapter Two), out of nine Lebanese publishers: three publishers sell the most in Beirut, two others sell the most in Riyadh, one publisher sells the most in Sharjah, and one in Cairo. Very few publishers chose Tunis and Algiers and both fairs received lower ratings for sales figures, ranging from four to ten. The nature of the Gulf States, including stability and economic factors, has a great effect on the sales of children’s books. Customers in both areas, Gulf and non-Gulf, also differ in their purchasing behaviours. The sections below will discuss the results from all the book fairs and then compare the results from both the Gulf and non-Gulf.

The Customers' Questionnaires

The Markets – Figure and Table X



Frequencies and percentages table		
X: Country		
Book Fairs	Frequency	Percentages
Abu Dhabi	19	5.8%
Algeria	29	8.8%
Beirut	61	18.6%
Doha	25	7.6%
Kuwait	48	14.6%
Muscat	45	13.7%
Sharjah	79	24%
Tunis	22	6.7%
Total	328	100.0%

This study of the Arab book fairs was conducted with Arabic children's books purchasers in book fairs in eight Arab countries.

The total sample size of respondent children's book customers in the Arab countries is 328. The purpose of the research was to collect information regarding the incentives that encourage customers to buy Arabic children's books. Crucial questions included: what are the book types the customers buy, how do customers know about new books, where do customers buy children's books, and why do customers buy children's books?

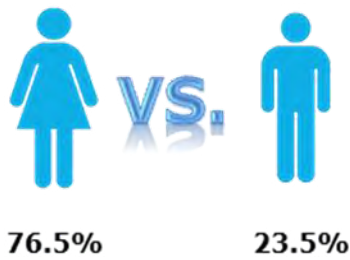
Sourcing information about customers is critical to sales and to understanding purchase behaviours. As Linton notes, "Reid et al. (2002) identify three sales behaviours; getting, giving, and using information" (Linton et al, 2009, p. 179). Getting information about the customers is crucial to understanding the customer in different parts of the Arab World. The questionnaires informed us of the nature of the customers, their purchases, and the reasons behind their purchase. The research aims at collecting customer information, which can be of a great help to researchers, publishers, and the sales teams in developing and implementing publishing companies' strategies and products.

What Can the Results from The Arab Book Fairs Tell Us?

The data from the book fair was analysed to find the common elements and differences between customers in the Arab World, and to establish and locate themes and trends.

This study examined customer preferences in eight Arab markets in order to better understand purchasing habits. The data from the customers' questionnaires has been inserted into the SPSS predictive analytics statistical programme to locate and identify trends. It is worth noting that some numbers might differ slightly from the figures in Chapter Three and Chapter Four and the analysis in the figures below. This is because the analysis figures only include the first places among the ranked customer choices (highlighting the role of the first choice), while Chapter Three and Chapter Four included all the selected and ranked choices. As discussed before in the Methodology, Chapter Three, and Chapter Four the number of questionnaires differed between book markets for many reasons, mainly the timing of the book fair, the number of visitors, and the customers' willingness to complete the questionnaires.

Gender – Figure and Table X1



Frequencies and percentages table X: 1. Gender		
Gender	Frequency	Percentages
Female	251	76.5%
Male	77	23.5%
Total	328	100.0%

Females are more likely than males to buy children's books in book fairs (women make up 3 out of 4 visitors buying children's books). Parents or teachers buying children's books in the Arab World are mainly women, usually visiting the children's book stands with their children. The results highlight the importance of addressing and targeting female children's book customers in the Arab World. Studies, like the ones by Gilligan, Krugman, and Farina, have proven that gender differences impact the consumer's behaviour.

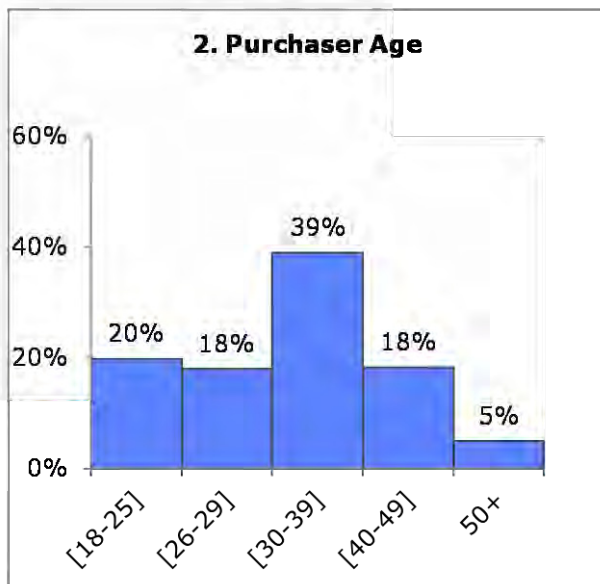
[R]esearch suggests that males and females often differ in how they process message claims (Meyers-Levy 1989). It appears that, relative to males, females often engage in more detailed elaboration of specific message content (Gilligan 1982; Krugman 1966). Accordingly, females sometimes are found to exhibit greater sensitivity to the particulars of relevant information when forming judgments than are males (Farina 1982; Lenney 1977; Meyers-Levy and Sternthal 1991)". (Joan et al, 1991, p. 63)

The way that female purchasers perceive content is different from that of males, while Kremer (2011) stresses that female purchasers are different when it comes to the issue of price. In his article *Using Statistics to Plan New Editorial*, bestselling marketing expert Kremer (2011) specifies that "[w]omen tend to be more price sensitive than men. Hence, they are much more likely to buy books at a discount".

The research above has taken into consideration the nature of the sensitive female purchaser who cares about the content of the products and is more conscious of the price, thus encouraging marketers to address the female purchasers differently. The fact that female purchasers are different from males might have played a role in the customers' responses in the questions analysed below. As Shah noted, "[i]f the buying decision of a particular product is influenced by the wife then the marketers will try to target the women in their advertisement. Here we should note that buying roles change with change in consumer lifestyles" (Shah, 2010).

According to the marketing expert Robert Craven, “there is no one-size-fits-all” to marketing to women. “Every customer base is different but there are some do’s and don’t’s” including targeting female customers with specific messages, avoiding negative campaigns and using more positive reasons for purchase, promoting details like self-service and warranties, and avoiding female stereotypes like “beauty queen” and “greying nannies”. Craven notes that marketing to women “is about catering to all their needs - not just focusing on the way in which they differ to men”.

Purchaser's Age – Figure and Table X2



	Frequencies and percentages table X: 2. Purchaser age	
Purchaser's age	Frequency	Percentages
[18-25]	65	19.8%
[26-29]	59	18.0%
[30-39]	128	39.0%
[40-49]	60	18.3%
50+	16	4.9%
Total	328	100.0%

Children's book customers differed in their ages, but the highest percentage of customers in the research in the Arab World were in their thirties, with very few ages 50 and up purchasing children's books.

Shah stresses the importance of age in consumer behaviour, where "[a]ge and life-cycle have potential impact on the consumer buying behaviour. It is obvious that the consumers change the purchase of goods and services with the passage of time" (Shah, 2010).

In their chapter *How Markets are Segmented*, Tanner et al (2010) divide customers according to their age group, specifying the customers' characteristics in different cycles.

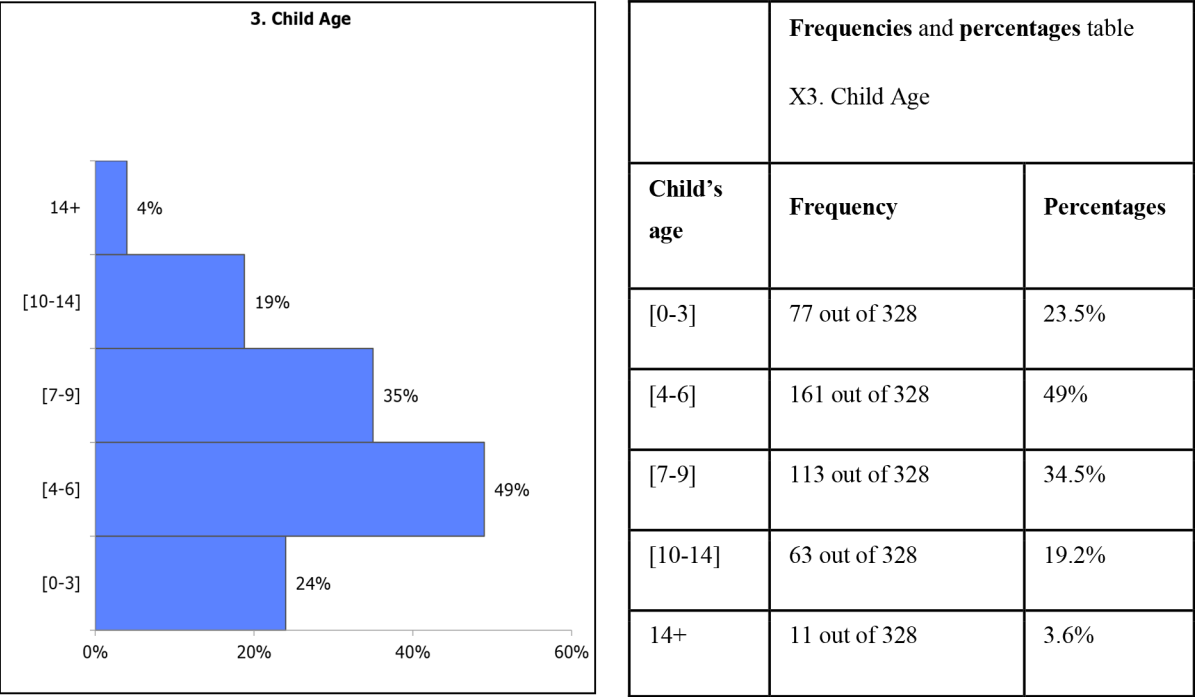
"Generation[s] also known as birth years characteristics" are divided into four parts:

- 1- "Seniors": "The Silent Generation", "Matures", "Veterans", and "Traditionalists" (1945 and prior) with characteristics include tending "to live within their means" and spend on health more than the other groups.
- 2- Baby Boomers: (1946–1964) who grew up before the widespread of credit, account for big percentage of consumer spending, and "willing to use new technologies as they see fit".

- 3- Generation X: (1965–1979) who are “comfortable but cautious about borrowing”, “buying habits characterized by their life stages”, and “embrace technology and multitasking”.
- 4- Generation Y: “Millennials”, “Echo Boomers”, includes “Tweens” (preteens) (1980–2000) who “grew up with credit cards”, “adept at multitasking; technology use is innate”, and “ignore irrelevant media”.

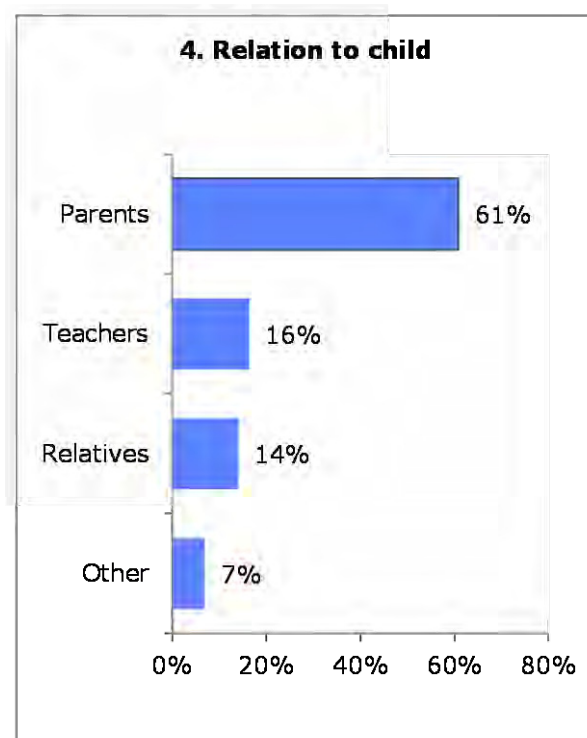
According to the graph above, most of the interviewed customers belong to Generation X and Generation Y (which are both comfortable with and affected by technology). The fact that these two generations make up the majority of children’s book customers in the Arab World (according to my sample) might indicate that customers are comfortable with and embrace technology. This is a factor to be taken into consideration when trying to reach customers. The fact that the use of technology is gaining popularity among the different generations will change each age brackets’ characteristics in the coming years, so further research should be carried out in the future. It is worth noting that since Generation X’s buying habits are characterized by their life stages, and since most of the families in the Gulf markets have relatively medium-to-high levels of income, customers in the Gulf constitute an important demographic to target. Customers’ responses are affected by their age category, in addition to other factors including the age range of the child for whom books are purchased.

Child’s Age – Figure and Table X3



Approximately half of the children’s book customers visiting the book fairs (49%) wish to buy books for children aged between 4 to 6 years. This is reflected in the number of books published in the Arab World for children of this age group. The data reflects the role that mothers play in purchasing books for elementary school children and the low amount of purchasing done for children ten and up. The data is also reflected in the lower production of books for children of ages ten and up discussed before in Figure 6 in Chapter Two, where approximately 33% of the books produced by Lebanese children’s book publishers’ respondents are picture books, compared to 18% of young adult books. It is worth noting that picture books are usually targeted at elementary school children, in addition to fairy tales/folk tales, information books, and graded books, as previously discussed in Chapter One.

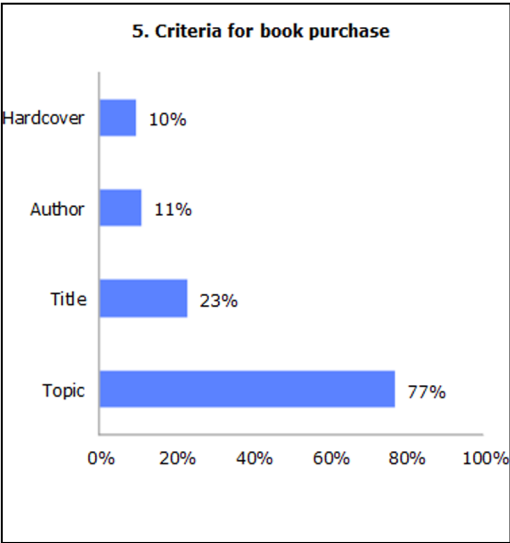
Relationship to the Child- Figure and Table X4



Frequencies and percentages table		
X4. Relation to child		
Relationship	Frequency	Percentages
Parents	204 out of 335	60.9%
Teachers	55 out of 335	16.4%
Relatives	47 out of 335	14.0%
Other	23 out of 335	6.9%

It is apparent from the graph above that the most common children's book customer in Arab World book fairs is a parent accompanied by their children. It is worth noting that the results are also similar to international trends where for instance "[in] a spring 1996 *Publishers Weekly* survey of bookstores, their customer demographics are as follows: 33.9% of children's book buyers are mothers, 20% are teachers, 13.7% are children, 11.6% are grandparents, 7.8% are fathers, 4.4% are friends, and 4.3% are other relatives" (Kremer, 2011). It is worth noting that if we combine the *Publishers Weekly* survey's totals of 11.6% grandparents with the 4.3% other relatives, the resulting 15.9% is very similar to the 14% that this study received for other relatives (with grandparents and other relatives included in one category). The results highlight the important role that mothers have in children's book purchases.

Criteria for Book Purchase - Figure and Table X5



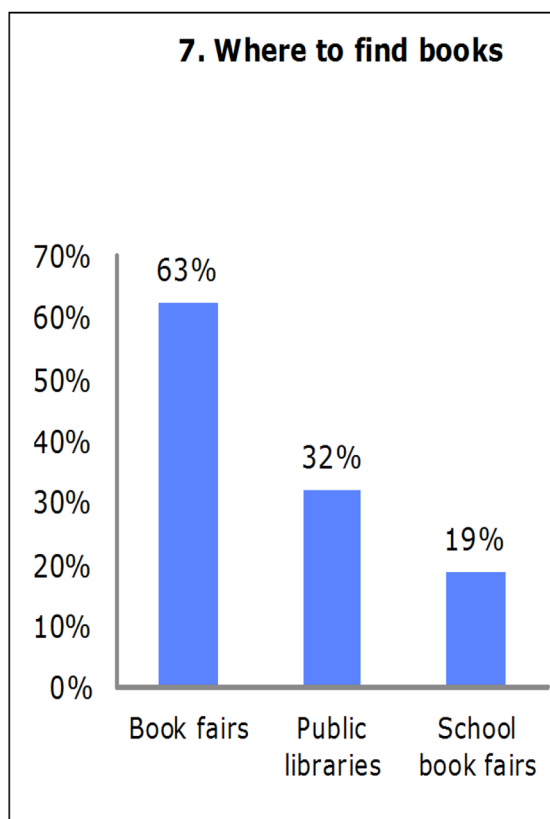
	Frequencies and percentages X5	
Criteria for purchase	Frequency	Percentages
Topic	251 out of 328	76.5%
Title	74 out of 328	22.5%
Author	35 out of 328	10.6%
Hardcover	32 out of 328	9.7%
Price	27 out of 328	8.2%
Illustrator	25 out of 328	7.6%
Publisher	23 out of 328	7.0%
Small size	17 out of 328	5.2%
Other	13 out of 328	3.9%
Eye-catching cover	12 out of 328	3.6%
Big size	6 out of 328	1.8%
Paperback	3 out of 328	0.9%

The main criterion for purchasing children’s books is “topic”. The “title” is the second criterion following topic; through the title many customers can recognize the topic of the book. Each of the other choices - publishers, authors, illustrators, illustrations, and cover - was chosen by around or less than 10% of the respondents, reflecting their minimal role in selling books to children’s book customers. This finding is very important because it identifies the incentive for purchasing books, namely an issue area or topic that a parent or guardian wants to explain or teach the child. This finding emphasizes the fact that guardians (teachers, parents, grandparents) use books as a tool to help teach, explain, train and tell their children about issues they deem important. The results are also supported by: the nature of the conservative Arab purchaser where the topic can play an important role in what will be presented to children, the nature of the female purchaser who considers the details and topics of books to present to children, and the nature of the mature respondent who has more experience with products and looks for certain topics in books (the high percentage of customers in their thirties).

Kremer (2011) places high importance on the topic in selling to the children’s book market. He argues “[i]f you want to sell books to this market, the books must have strong child appeal (play value or high interest) as well as value (since parents or grandparents make the final decision in most cases)”.

It is worth noting that in the UK and other western markets, the power of the author and series brand plays a large role in sales, in contrast to the Arab market, which relies mainly on the power of a book's "topic". This might be due to the fact that children's book publishing is relatively new compared to the other markets, and the habit of purchasing books by the same author is not yet developed. It can also be due to the fact that Arabs are not as enthusiastic readers as their western counterparts, and buying books from the same author can be associated with a developed taste and an experienced customer. Other variables include the fact that there are more translated books in the Arab market than in the UK market, children's books are used in schools and by teachers as resources, bookshops do not usually display books by the same author in the same way, and publishers do not highlight children's book authors in their catalogues.

**Where to find out about new Books –
Figure and Table X7**



Frequencies and percentages table		
X7. Where to find new books		
Where to find out	Frequency	percentages
Book fairs	205 out of 328	62.5%
Public libraries	105 out of 328	32%
School book fairs	61 out of 328	18.5%
Don't find out any books	48 out of 328	14.6%
Facebook	45 out of 328	13.7%
Bookshop windows	42 out of 328	12.8%
Advertisement	37 out of 328	11.2%
Email	26 out of 328	7.9%
Newspapers articles	25 out of 328	7.6%
Teacher/School	25 out of 328	7.6%
Television	22 out of 328	6.7%
Publishers' catalogues	22 out of 328	6.7%
Twitter	18 out of 328	5.5%
Radio	6 out of 328	1.8%

61% of purchasers find out about new Arabic language children's books in book fairs. The results highlight the role of book fairs not only in book sales, but also in presenting titles to customers. Public libraries were chosen by around 31% of children's book customers as a place to find out about new titles. The North African book fair results skew this figure, since the public libraries there play a major role in presenting new titles, as discussed in Chapter Four. It is a reasonable hypothesis to suggest that people gave the answer that they knew about new titles from public libraries since the customers feel that it is a positive activity to do and the possibility drove them to select this choice. Whereas elsewhere, school book fairs are becoming more popular in the Arab World and especially the Gulf States, where customers (children, teachers, and parents) can buy and learn about the children's books available in the market. The popularity of school book fairs might be linked to several factors including the habit of purchasing books and knowing about new titles through fairs, the school book fairs compensating for the small number of bookshops in most of the Arab World, the schools benefiting from the school book fair sales (by either taking percentages of the sales in cash

or books for their school library), and the willingness of publishers to display books and take part in school book fairs for sales. Around 14% of customers do not find out about new titles, which highlights the need to experiment with marketing children's books, while around 10% of respondents know about new titles from different sources like social media, advertisement, bookshop windows, and emails.

The results from the questionnaires suggest that the marketing communication tool for children's books in the Arab World is mainly "below-the-line [which] includes sales promotion, public relations, and personal selling" in contrast to "above-the-line" which has activities relating to promotional activities through mass media (Linton et al., 2009, p. 171), including television, radio, and social media. Linton et al. (2009, p. 174) stress that the internet is "relatively inexpensive to set up", but has some disadvantages including the fact that the internet is a "still developing medium" and "growing rapidly". Although marketing through the media has many advantages, including high impact, mass audience, and can be targeted (Linton et al., 2009, p. 178), very few Arabic children's book customers learn about books through media, including social media. It is worth noting that newspaper, radio, and television marketing are usually costly, putting more burdens and costs on the Lebanese publisher who is usually trying to reduce expenses and market mainly through book fairs.

Kremer (2011) emphasizes the role that television can play in promoting children's books. He notes "[o]n a typical day, 59% of kids [in the US] (six months to two years) watch television. 43% watch a video or DVD ...TV is the most effective medium for reaching children".

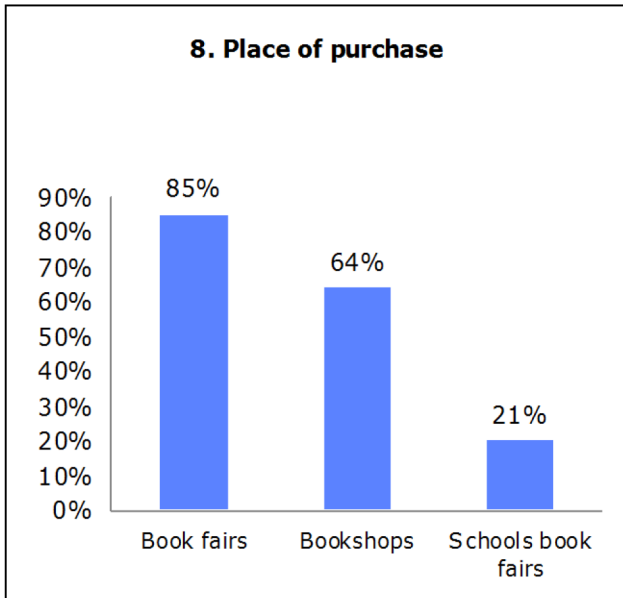
In her article in *Publishers Weekly* in the US, Gilmore highlights the important role that TV and tablets have in marketing children's books:

Almost all children watch TV (97–99%) and usually for around twenty minutes a day on average. ... among kids aged 11-13, tablets are the preferred method of watching videos (comedy and user-generated content is the most popular) and gaming. They also engage the tablets to use apps, browse and participate in social networking. As kids hit adolescence, smart-phones begin to dominate over tablets. (Gilmore and Burnette, 2014)

Looking at Table 38 in Chapter One, responding Lebanese publishers' market children's books mainly through book fairs, school book fairs, and school visits. Very few other media are used: TV (three publishers and ranked seventh place by one), Facebook (three publishers), public libraries (one publisher), newspaper (one publisher), and e-marketing (one publisher). The results highlight the need to experiment with marketing through

media like television, media, social media, and public libraries which have either been chosen by customer respondents or have proven to be effective in other markets. The fact that Lebanese publishers publish relatively fewer titles for ages ten and up than books for elementary school children might have affected the minimal use of material for tablets to market to this age group.

Place of Purchase – Figure and Table X8



Frequencies and percentages table		
8. Place of purchase		
Place of purchase	Frequency	Percentages
Book fairs	280 out of 328	85.3%
Bookshops	211 out of 328	64.3%
School book	69 out of 328	21.0%
Shopping malls	24 out of 328	7.3%
Internet	22 out of 328	6.7%
Games stores	13 out of 328	3.9%
Supermarkets	8 out of 328	2.4%

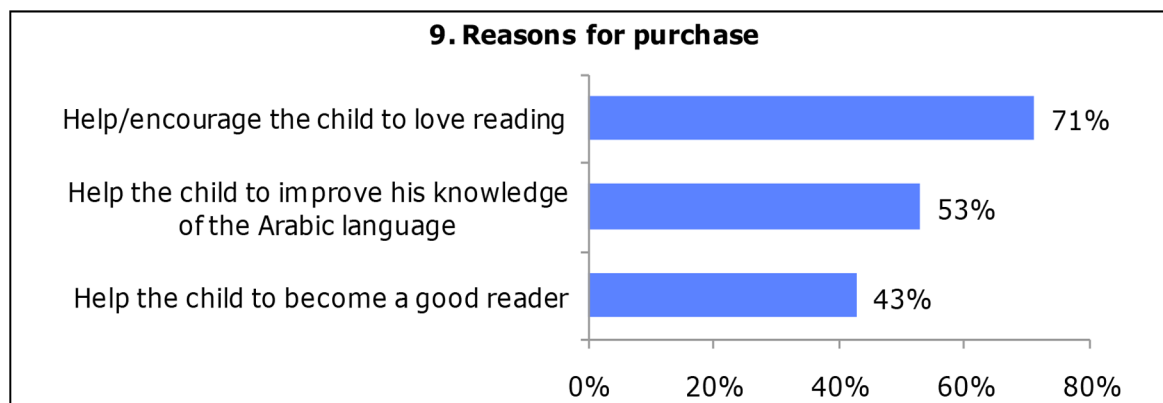
Book fairs came in first as the place to purchase children's books, with around 85%. Bookshops are second place with 63%. The results highlight the role of book fairs as sales channels for Arab publishers and customers as discussed previously in the Literature Review and Chapter Two, where both the publishers and customers look forward to the event to engage in the selling/buying process. It is worth noting that most of the respondents who chose bookshops selected that channel in addition to book fairs. This highlights the role that the available bookshops in the Arab World can play in selling books.

As discussed previously in Chapter Two, almost all responding publishers have major sales through book fairs, whereas only five out of nine publishers sell through bookshops. The Lebanese publishers' responses also included government orders, school book fairs, and distributors among the high selling channels. In addition, as discussed previously in the Literature Review and Chapter One, book fairs provide an opportunity to present a variety of publications at discounted prices, which most bookshops cannot offer to the customers.

The fact that Arabic children's books are rarely available for customers in supermarkets, toy stores, and shopping malls is reflected in the low response rates.

As discussed previously in Chapter One, Chapter Three, and Chapter Four, the use of the internet as a shopping medium is still very low in the Arab World, which is also reflected in the 6.7% of respondents buying books online.

Reasons for Purchase – Figure and Table X9



Frequencies and percentages table		
9. Reasons for purchase		
Reasons for purchase	Frequency	percentages
Help/encourage the child to love reading	239 out of 328	72.8%
Help the child to improve his knowledge of the Arabic language	177 out of 328	53.9%
Help the child to become a good reader	143 out of 328	43.5%
Develop child's imagination	66 out of 328	20.1%
Help the child to get better grades in school	38 out of 328	11.5%
Upon teacher request	22 out of 328	6.7%
Cheaper than foreign books	15 out of 328	4.5%

The goals of purchasing Arabic children's books are initially to encourage children to love reading, as well as to improve their Arabic language skills. The need to promote reading in the Arab World is essential with markedly low levels of reading evident when compared with other parts of the world (as discussed previously in the Literature Review). Schools, governments, and NGOs are working on promoting reading and encouraging parents to help their children.

In their article "How Reading Books Fosters Language Development around the World", Dickinson et al. (2012) stress the importance that children's books have in many areas, arguing that

[t]here is evidence that simply providing books has value, especially in settings where very few books are otherwise available, but evidence is much stronger that the combination of books and guidance for reading has great potential to result in and lead to more frequent and more effective reading and improvements in children's language and self-regulatory competencies.

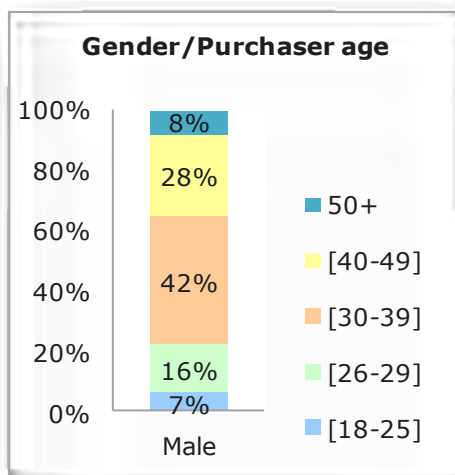
Research has proven that books can help children to love reading, learn languages, becoming a better reader, develop their imagination, and get better grades at school. Parents' responses varied, but with the majority aiming at promoting reading and language, which are both major problems facing children in the Arab World (as discussed previously in the Literature Review and Chapter One).

Initial perception that responses were likely to be in the field of "improving child's grades" and "teacher's request" is repudiated by the evidence displayed here of the essentially loving care usually associated with mothers and the power of the word-of-mouth on the importance of books to children.

Analysis

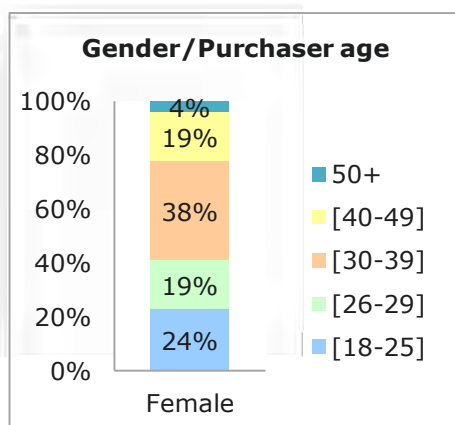
This part of the research (Chapter Three, Chapter Four, and Chapter Five) has examined trends in children's book purchase preferences in Arab book fairs. Based on the responses in the different book fairs, the frequently chosen responses have been combined together to be analysed using the programme SPSS previously discussed in this chapter. The following section will analyse core factors, and attempt to examine correlations between variables identified.

Gender and Purchaser's age – Figure and Table Y1



Frequencies and conditional percentages table		
X: 1. Gender Y: 2. Purchaser age		
Male		
	(count)	(perc.)
[18-25]	5	6.6%
[26-29]	12	15.8%
[30-39]	32	42.1%
[40-49]	21	27.6%
50+	6	7.9%
Total	76	100.0%

Figure and Table Y2

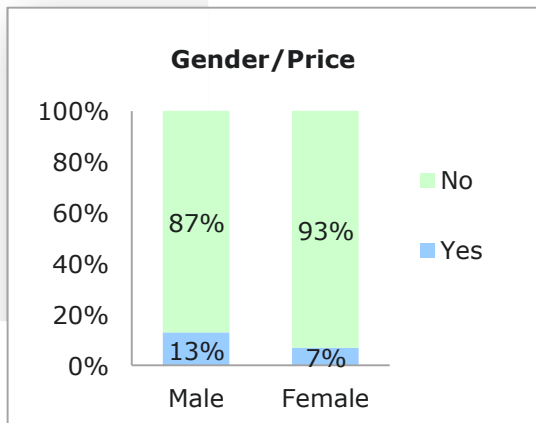


Frequencies and conditional percentages table		
X: 1. Gender Y: 2. Purchaser age		
Female		
	(count)	(perc.)
[18-25]	59	24%
[26-29]	47	19%
[30-39]	96	38%
[40-49]	39	16%
50+	9	4%
Total	250	100.0%

Gender is a determining factor in children's book purchases. The study found that 42% of male purchasers are aged between 30-39 years old. In other terms, 64% are less than forty years old, and 36% more than forty years old. The results reflect that male children's book purchasers are from different age categories and thus there is no trend in the purchasing behaviour of men of a certain age group. It is worth noting that the ages of female purchasers are not distributed identically to male. Female purchasers are quite a lot

younger with 24% aged between 18 and 25, against 7% only for male purchasers highlighting the stronger role that younger female purchasers have compared to young male purchasers in purchasing children's books in book fairs. The fact that most of the purchasing males are fathers (where marriages are usually between younger females and older males) might have affected the results, showing a concentration of male purchasers between the ages of 30-50.

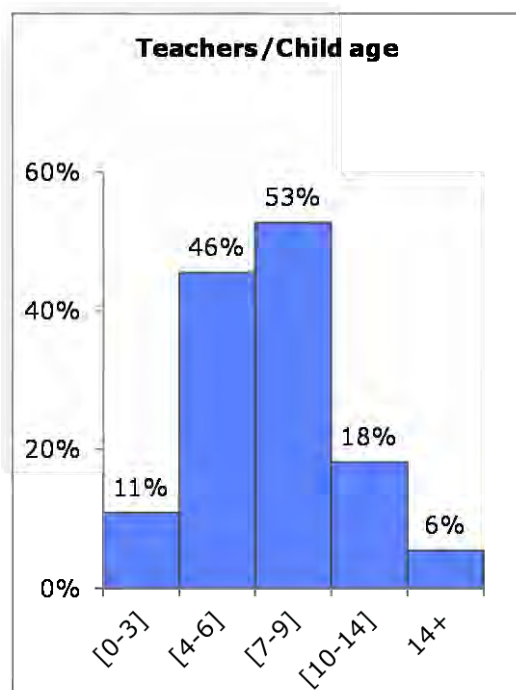
Gender with Price – Figure and Table Y3



Price	Female	Male	Female	Male
No	234	67	93%	87%
Yes	17	10	7%	13%
	251	77	100%	100%

As discussed before (see page 5 in this chapter) in his article “Using Statistics to Plan New Editorial”, Kremer (2015) stresses that female purchasers are more sensitive to price than male purchasers. In contrast, by comparing 13% and 7% between the two groups of female and male purchasers in the Arab World, we get a critical probability quite above the limit of 5% (statistical number proving if there is a relationship or not). This being said, I cannot conclude that sensitivity to price varies between male and female purchasers, because such differences can be attributed to chance. It is worth nothing that the number of purchasers choosing price is very small and thus further study on the relationship of gender of children’s book purchasers in the Arab World and price is needed.

Teachers with Child's Age –Figure and Table Y4

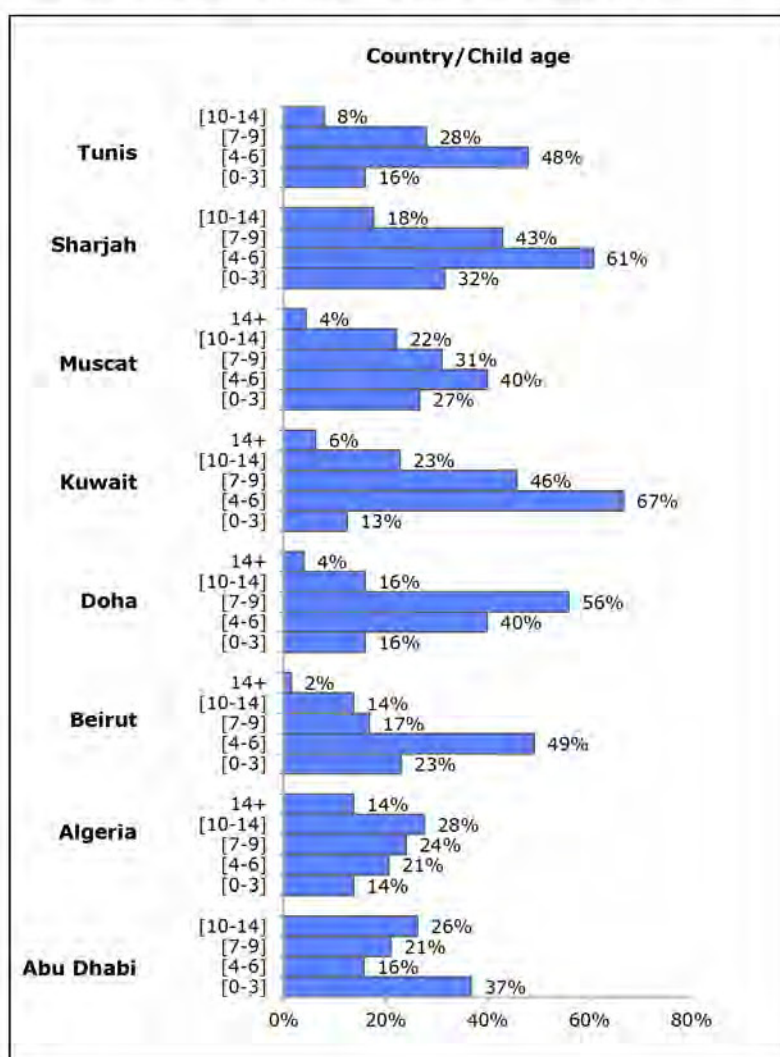


Frequencies and conditional percentages table		
X: Teachers		
Y: 3. Child age		
Teacher		
	(count)	(perc.)
[0-3]	6 out of 55	10.9%
[4-6]	25 out of 55	45.5%
[7-9]	29 out of 55	52.7%
[10-14]	10 out of 55	18.2%
14+	3 out of 55	5.5%

The study examined the purchasing preferences of teachers. The questionnaire attempted to establish if there are similarities between teachers in their goals in book fairs. The majority of the teachers come to book fairs to buy books for children aged between 4-6 and 7-9 years old. The results can reflect the role that children's books have in teaching in preschools and elementary schools, since many teachers buy books to use as supplementary material for teaching or to place in the classroom library.

Very few teachers buy children's books for children older than ten. This might be due to the small number of titles produced for this age group, the possibility that the love of reading has decreased at this age group, and the likelihood of having more homework assignments and a need to focus on textbooks can have on reading for this age group. The research highlights the need to further study this age group and their requirements in the Arab World.

Specific Market with Child's Age – Figure and Table Y5

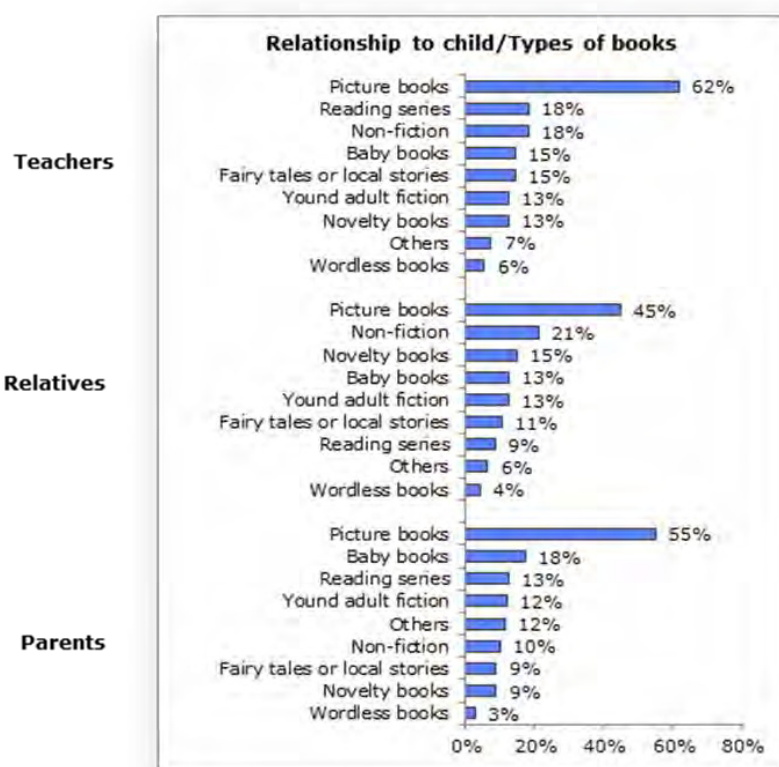


Frequencies and conditional percentages table															
X: Market Y: Child age															
Abu Dhabi		Algiers		Beirut		Doha		Kuwait		Muscat		Sharjah		Tunis	
count	perc.	count	perc.	count	perc.	count	perc.	count	perc.	count	perc.	count	perc.	count	perc.
[0-3]	7 36.8%	4 13.8%	15 24.5%	4 16.0%	6 12.5%	12 26.7%	25 31.6%	4 18.1%							
[4-6]	3 15.8%	6 20.7%	32 52.4%	10 40.0%	32 66.7%	18 40.0%	48 60.8%	12 54.5%							
[7-9]	4 21.1%	7 24.1%	11 18%	14 56.0%	22 45.8%	14 31.1%	34 43.0%	7 31.8%							
[10-14]	5 26.3%	8 27.6%	9 14.7%	4 16.0%	11 22.9%	10 22.2%	14 17.7%	2 9.0%							
14+	0 0.0%	4 13.8%	1 1.6%	1 4.0%	3 6.3%	2 4.4%	0 0.0%	0 0.0%							
out of 19		out of 29		out of 61		out of 25		out of 48		out of 45		out of 79		out of 22	

The graph above demonstrates the age groups that the book fair customers shopped for in each book market. For example, in Beirut, half of the purchases are for children between 4-6 years old. Most of the book fairs have similar results for purchases, and the highest is for children aged 4-6, except for Doha which shows higher percentages for children's books for ages 7-9, Algiers which shows higher percentages for children of ages 10-14, and Abu Dhabi for those 0-3 years old. The results in Algiers, discussed before in Chapter Three, can be the result of the slow technological exposure in Algeria decreasing the temptations that 10-14 year olds are exposed to and directing them to reading. As discussed before in Chapter Four, the results in Abu Dhabi, which are based on a small number of responses, can stem from the increased campaigns to promote reading. It is worth noting that in both Kuwait and Muscat, where more than 25% of the purchases were intended for children of the ages ten and up, respondents aimed at purchasing children's books for different age groups and had multiple responses, while the biggest percentage of purchases were intended for elementary school children.

Relationship to the Child with Types of Books – Table and Figure Y6

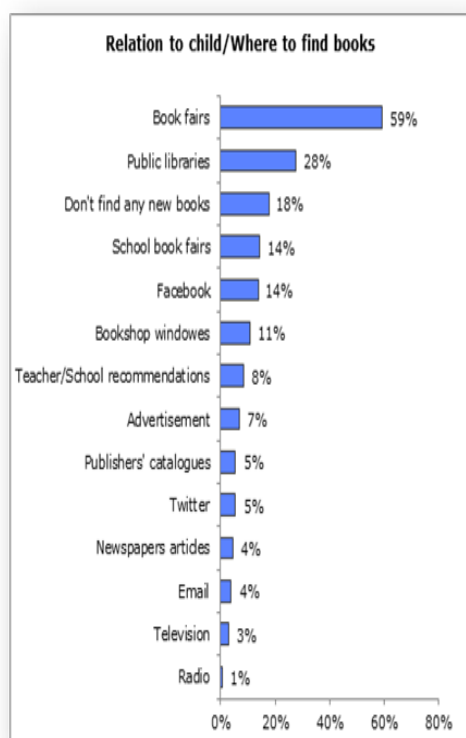
	Frequencies and conditional percentages table					
	X: Relation to child			Y: Types of books		
	Parents		Relatives		Teachers	
	(count)	(perc.)	(count)	(perc.)	(count)	(perc.)
Novelty Books	18	8.8%	7	14.9%	7	12.7%
Baby books	36	17.6%	6	12.8%	8	14.5%
Fairy tales or local stories	18	8.8%	5	10.6%	8	14.5%
Picture books	112	54.9%	21	44.7%	34	61.8%
Wordless Books	6	2.9%	2	4.3%	3	5.5%
Non-fiction	21	10.3%	10	21.3%	10	18.2%
Reading series	26	12.7%	4	8.5%	10	18.2%
Young adult fiction	25	12.3%	6	12.8%	7	12.7%
Others	24	11.8%	3	6.4%	4	7.3%
	out of 204		out of 47		out of 55	



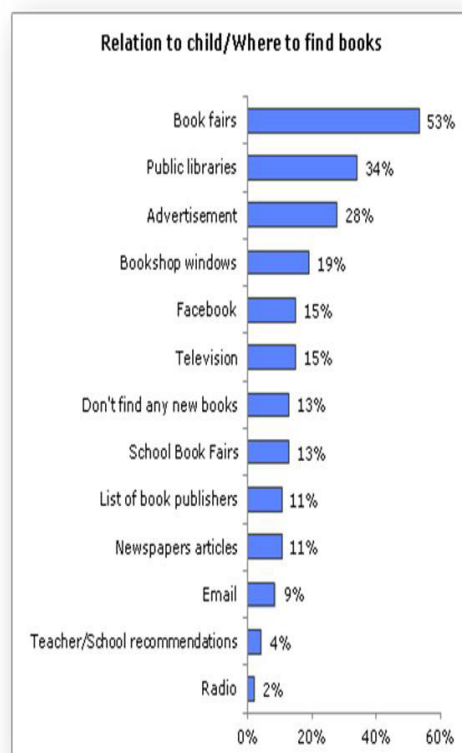
It is apparent from the table above that most of the teachers in the Arab World visiting children's book stands are looking for picture books, while a smaller number (18%) are looking for graded reading series and novelty books. Again, the statistics highlight the role of picture books in teaching and their role in schools, discussed previously in Chapter Two. In addition, picture books are also purchased by parents and other relatives, where around half of them want to purchase picture books.

Where do Different Customers Find out about Books? – Figures and Table Y7

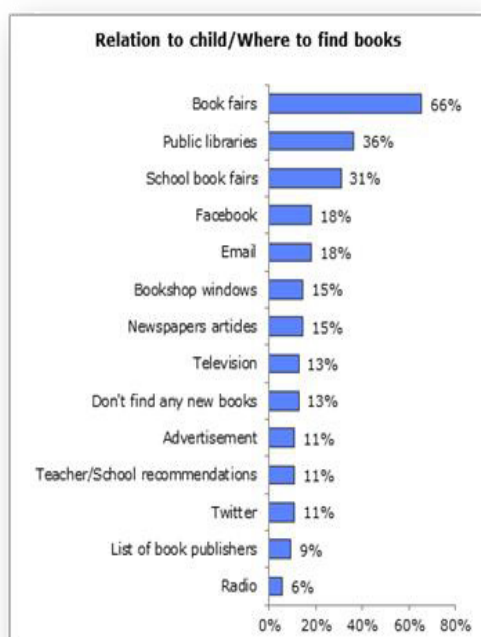
Parents



Relatives



Teachers



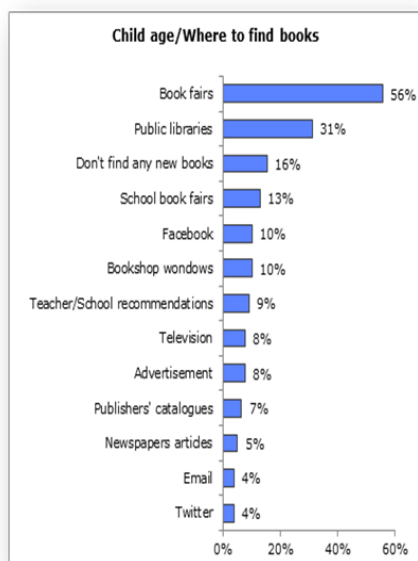
	Frequencies and conditional percentages table					
	X: Relation to child			Y: Where to find books		
	Parents		Other Relatives		Teachers	
	(count)	(perc.)	(count)	(perc.)	(count)	(perc.)
7.1 Public libraries	56	27.5%	16	34.0%	20	36.4%
7.2 Schools exhibitions	29	14.2%	6	12.8%	17	30.9%
7.3 Newspapers articles	9	4.4%	5	10.6%	8	14.5%
7.4 Exhibitions	121	59.3%	25	53.2%	36	65.5%
7.5 Twitter	11	5.4%	0	0.0%	6	10.9%
7.6 Teacher/School recommendations	17	8.3%	2	4.3%	6	10.9%
7.7 Advertisement	14	6.9%	13	27.7%	6	10.9%
7.8 List of book publishers	11	5.4%	5	10.6%	5	9.1%
7.9 Email	8	3.9%	4	8.5%	10	18.2%
7.10 Don't find any new books	36	17.6%	6	12.8%	7	12.7%
7.11 Bookshop windows	22	10.8%	9	19.1%	8	14.5%
7.12 Television	6	2.9%	7	14.9%	7	12.7%
7.13 Facebook	28	13.7%	7	14.9%	10	18.2%
7.14 Radio	1	0.5%	1	2.1%	3	5.5%
	out of 204		out of 47		out of 55	

Parents and teachers are two of the main children's book customers in the Arab World. The research attempted to determine if teachers find children's books in different ways from parents and relatives. The study arrived at the conclusion that parents, relatives and teachers agree that book fairs are the best place to find new children's books in the Arab World. In addition, parents, relatives, and teachers find out about new titles in relatively similar ways, with around 30% finding out through public libraries. The highest percentage among these is for teachers. It is apparent from the results above that 31% of the teachers find out about new titles through school book fairs, in contrast to the 14% and 13% by parents and other relatives. This is due to the fact that school book fairs are usually intended to be visited by pupils during school hours, and very few parents and relatives have access to. Facebook had similar results (14%, 15% and 18%) among parents, relatives, and teachers, reflecting its developing impact on the three groups. Around 18%, 13%, and 13% of parents, relatives, and teachers do not find out at all about new titles,

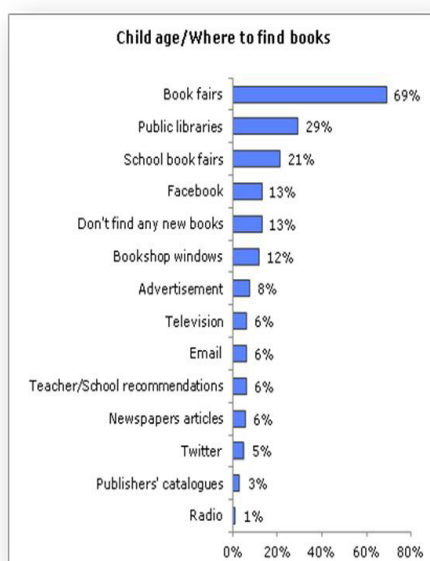
reflecting the need to target and market to the three groups. At forty-seven respondents, other relatives present a small number of the research responses. However, it is worth noting that around 28% of relatives know about new books through advertisements, reflecting the need for further research on marketing and the use of advertisement and other relatives.

The Child's Age with Where to Find out About Books – Figures and Table Y8

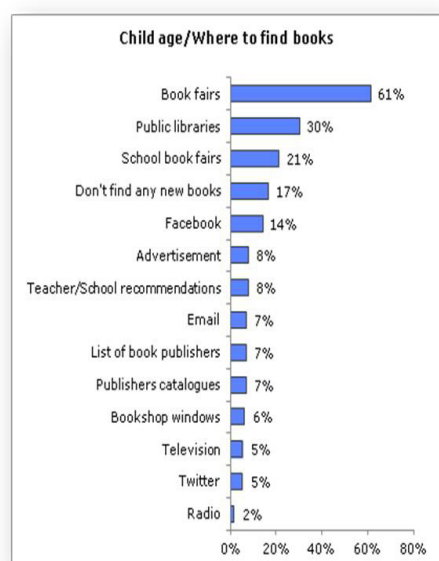
[0-3]



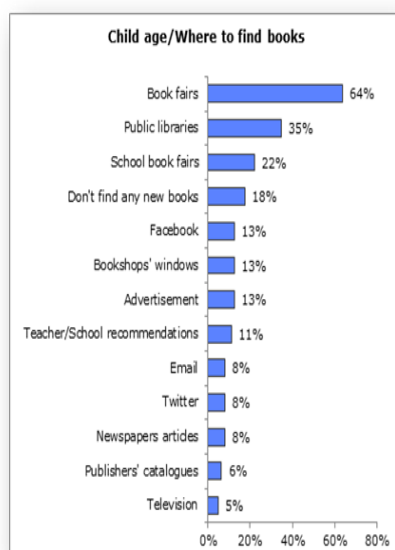
[4-6]



[7-9]



[10-14]



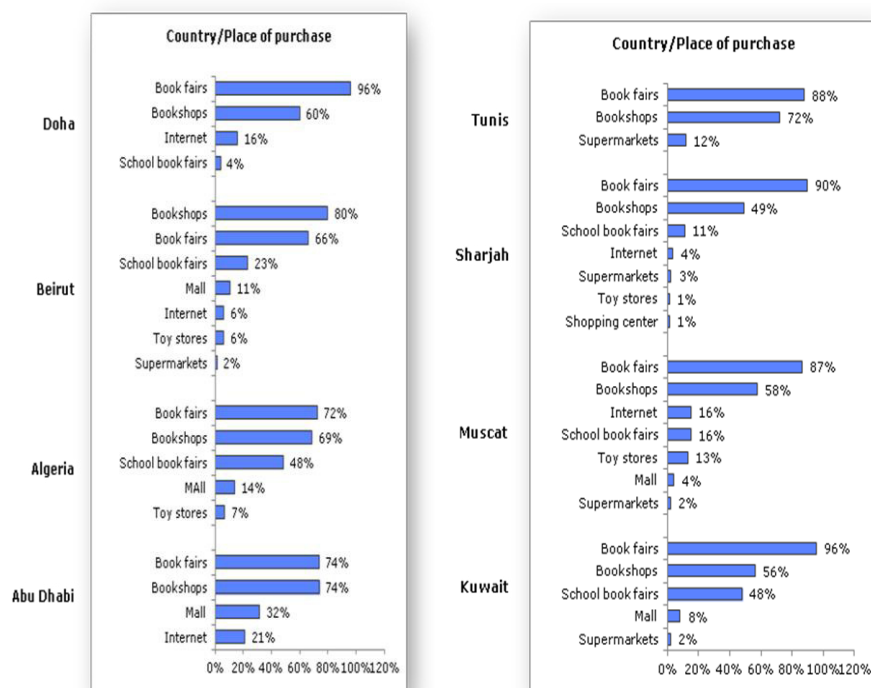
14+



	Frequencies and conditional percentages table									
	<i>X</i> : Child age					<i>Y</i> : Where to find books				
	[0-3]		[4-6]		[7-9]		[10-14]		14+	
	count	(perc.)	count	(perc.)	count	(perc.)	count	(perc.)	count	(perc.)
Public libraries	24	31.2%	47	29.2%	34	30.1%	22	34.9%	5	45.5%
Schools book fairs	10	13.0%	34	21.1%	24	21.2%	14	22.2%	5	45.5%
Newspapers articles	4	5.2%	9	5.6%	8	7.1%	5	7.9%	1	9.1%
Book fairs	43	55.8%	111	68.9%	69	61.1%	40	63.5%	10	90.9%
Twitter	3	3.9%	8	5.0%	6	5.3%	5	7.9%	1	9.1%
Teacher/School recommendations	7	9.1%	10	6.2%	9	8.0%	7	11.1%	3	27.3%
Advertisement	6	7.8%	12	7.5%	9	8.0%	8	12.7%	2	18.2%
Publishers' catalogues	5	6.5%	5	3.1%	8	7.1%	4	6.3%	2	18.2%
Email	3	3.9%	10	6.2%	8	7.1%	5	7.9%	2	18.2%
Don't find any new books	12	15.6%	21	13.0%	19	16.8%	11	17.5%	0	0.0%
Bookshop windows	8	10.4%	19	11.8%	7	6.2%	8	12.7%	2	18.2%
Television	6	7.8%	10	6.2%	6	5.3%	3	4.8%	1	9.1%
Facebook	8	10.4%	21	13.0%	16	14.2%	8	12.7%	2	18.2%
Radio	0	0.0%	2	1.2%	2	1.8%	0	0.0%	1	9.1%
	Out of 77		Out of 161		Out of 113		Out of 63		Out of 11	

The research tried to discover whether children's books for children of different age groups can be found in different sources. The research found that book fairs are once again the customers' first choice, regardless of the child's age. The results also reflect the very similar responses in the other categories, highlighting that there are no major differences between the age group the customers intend to buy for and where they find out about new books.

Book Markets in the Region with Place of Purchase – Figures and Table Y9



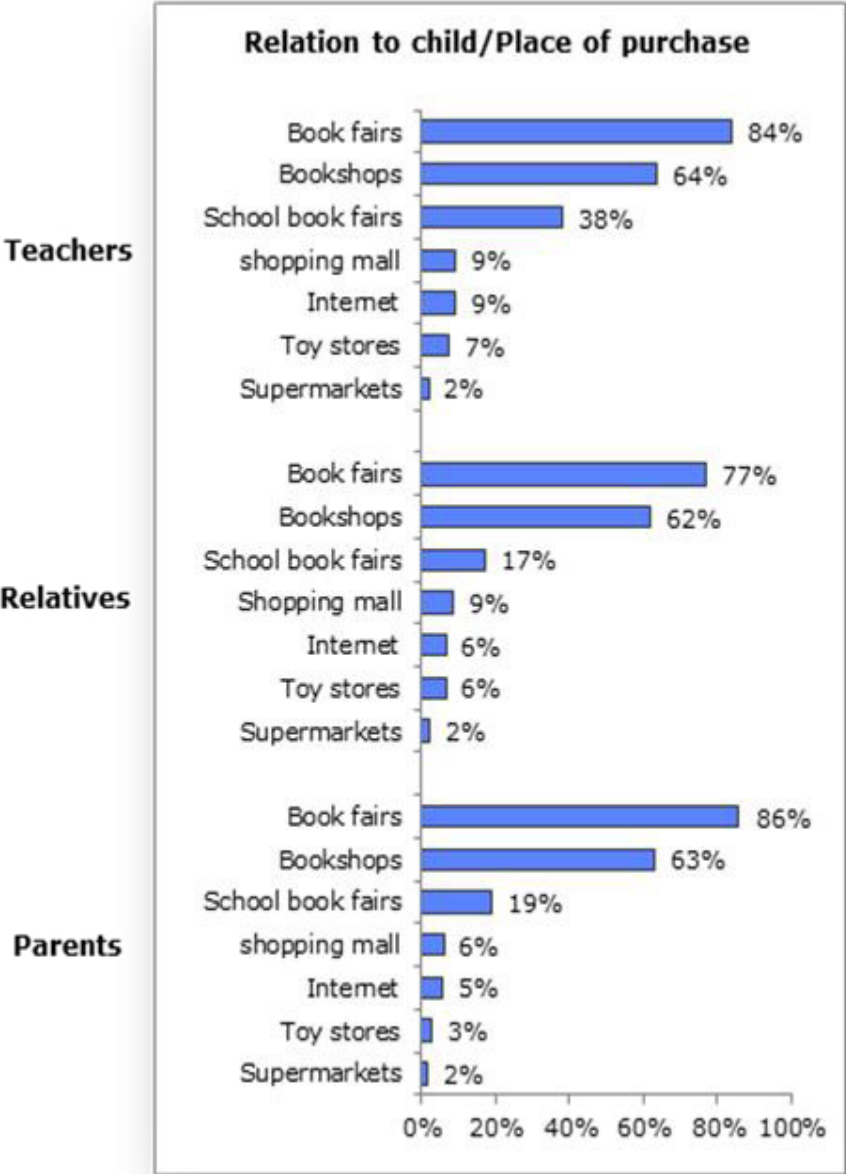
	Frequencies and conditional percentages table															
	X: Market								Y: Place of purchase							
	Abu Dhabi		Algeria		Beirut		Doha		Kuwait		Muscat		Sharjah		Tunis	
	(count)	(perc.)	(count)	(perc.)	(count)	(perc.)	(count)	(perc.)	(count)	(perc.)	(count)	(perc.)	(count)	(perc.)	(count)	(perc.)
Bookshops	14	73.7%	20	69.0%	52	85.2%	15	60.0%	27	56.3%	26	57.8%	39	49.4%	16	72.0%
Toy stores	0	0.0%	2	6.9%	4	6.5%	0	0.0%	0	0.0%	6	13.3%	1	1.3%	0	0.0%
Supermarkets	0	0.0%	0	0.0%	1	1.6%	0	0.0%	1	2.1%	1	2.2%	2	2.5%	3	12.0%
Book fairs	14	73.7%	21	72.4%	43	70.4%	24	96.0%	46	95.8%	39	86.7%	71	89.9%	19	88.0%
Internet	4	21.1%	0	0.0%	4	6.5%	4	16.0%	0	0.0%	7	15.6%	3	3.8%	0	0.0%
Shopping mall	6	31.6%	4	13.8%	7	11.4%	0	0.0%	4	8.3%	2	4.4%	1	1.3%	0	0.0%
Schools book fairs	0	0.0%	14	48.3%	15	24.5%	1	4.0%	23	47.9%	7	15.6%	9	11.4%	0	0.0%
	Out of 19		Out of 29		Out of 61		Out of 25		Out of 48		Out of 45		Out of 79		Out of 22	

It is apparent that children's book customers in the Arab World primarily buy books from book fairs, followed by bookshops. The results from the Gulf markets did not differ much from the rest of the region. Although

online sales in the Middle East account for less than 1% of total retail sales, the ecommerce industry is expected to grow fast. The estimated number of internet users in the Middle East is over 130 million. But only 15% of Middle East businesses currently have an online presence. (*Ecommerce Insight*, 2014)

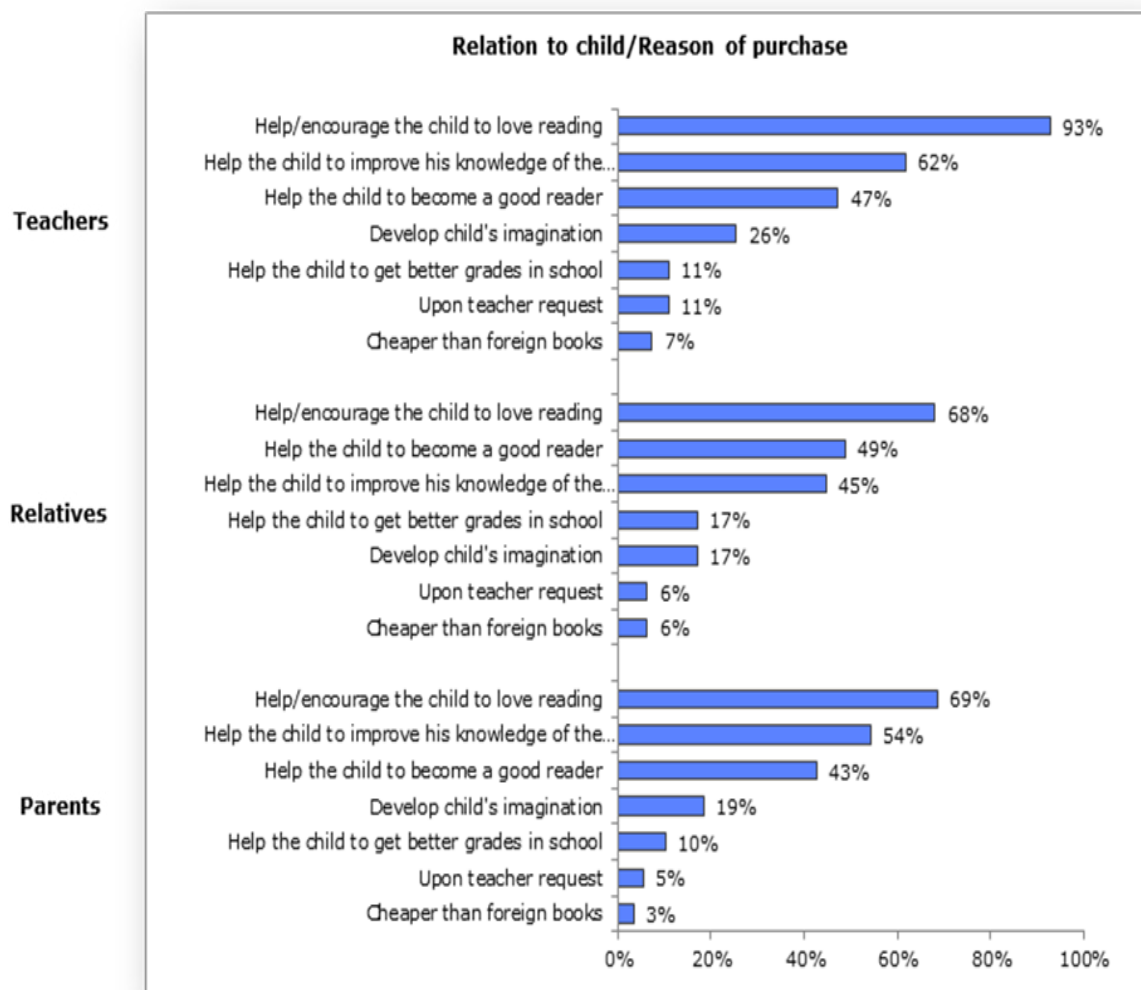
This article points out that the UAE is the leader in the Arab World in online sales: by 15% of internet users, shop online for books, which is reflected in the data collected in this research and demonstrated in the tables above. Approximately 21% of the Abu Dhabi children's book customers (which is itself only a small sample) buy books online, unlike all the other areas where the percentages of online shopping are much lower. The results might be due to the better-enforced piracy laws in the UAE, and relative frequency of piracy in countries like Lebanon. Sharjah's results were quite different, with 4% of purchases made online, which might be due to the fact that lifestyles differ between the two emirates, highlighting the need for further research on both markets.

Relationship to the Child with the Place of Purchase – Figure Y10



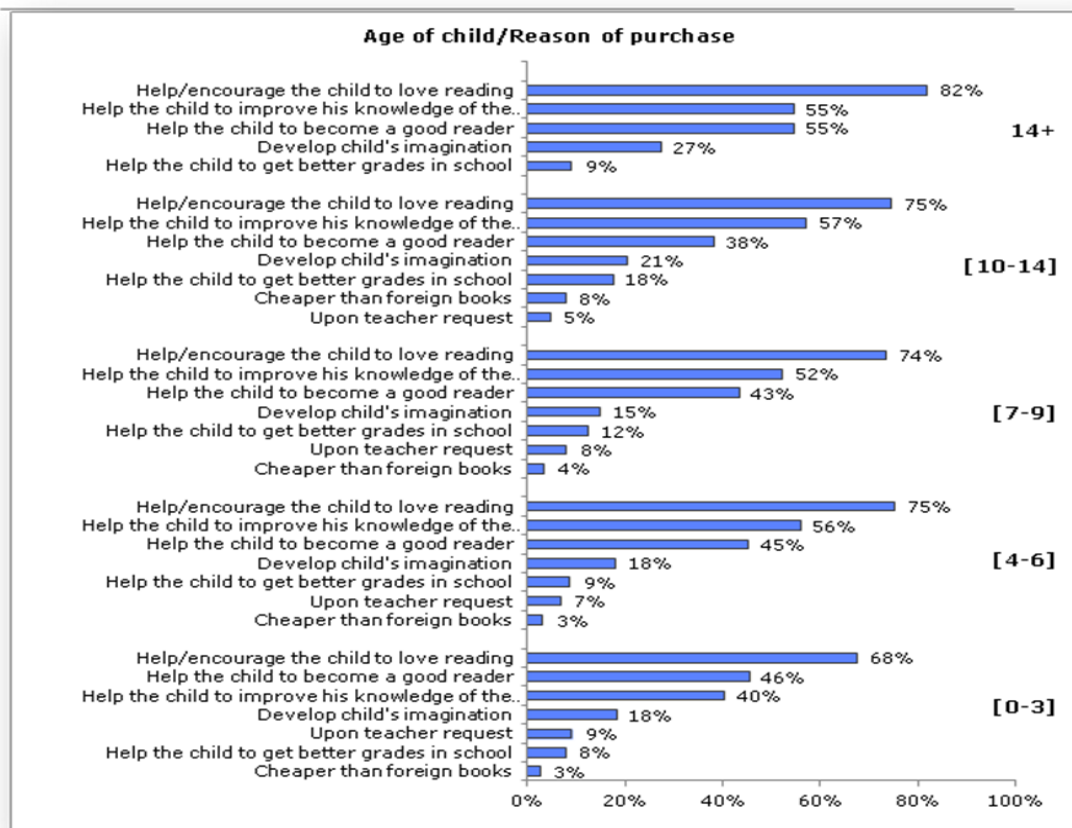
There was no connection between the children’s book customers’ relationship to the child and the place of purchase. Most of the customers (including teachers, parents, and other relatives) purchased books from book fairs, followed by bookshops while more teachers purchased books from school book fairs.

Relationship to the Child with Reason for Purchase – Figure Y11



The study identified that children's book customers in the Arab World are parents, other relatives and teachers, who mostly believe that purchasing a book will help and encourage the child to love reading. Governments, schools, and NGOs in the Arab World (as discussed in the Literature Review, Chapter Three, and Chapter Four) are working on promoting the love of reading through reading campaigns, developing and creating libraries, and purchasing books. The need to promote reading is also reflected in the customers' responses, where the choice of encouraging the love of reading was chosen by most teachers (93%) and a big percentage of parents and other relatives. It is apparent from the results above that teachers made more than one choice when it came to the reason of purchase, highlighting the role of children's books in education.

Age of Child and Gender with Reason for Purchase – Figure Y12



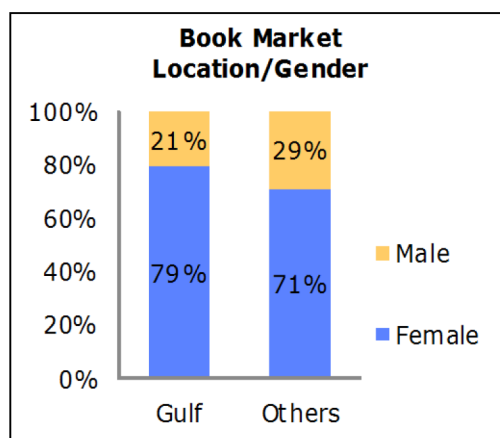
Most of the children's book customers in the Arab World buy books for children of different age groups and buy for the same reason: to help the child love reading. The results are almost the same when male and female customers were compared, showing that reason for purchase is not affected by the age of the child or the gender of the respondent.

The Gulf Book Market and the Other Book Markets

It is apparent from the publishers' questionnaires in Chapter Two that most Lebanese children's book publishers sell more in the Gulf States. As discussed in Chapters Three and Chapter Four, the Gulf States' book fairs are different from other bookfairs in the Arab World. The research looked for differences in customers from both areas, Gulf and non-Gulf, by comparing the data. Kuwait (Kuwait), Muscat (Oman), Doha (Qatar), Abu Dhabi (UAE), and Sharjah (UAE) were grouped under Gulf book fairs and markets. The other markets were Beirut (Lebanon), Tunis (Tunisia), and Algeriers (Algeria) where these three markets had elements that differentiated them from the Gulf market: mainly the lower income rate, political instability, and the previous French colonisation (with the effects mainly use of French and spread of public libraries).

The following section will compare the questionnaire results from the Gulf to those in the non-Gulf region. The purpose is to assess and compare the behaviour of children's book purchasers between Gulf States markets and the other markets.

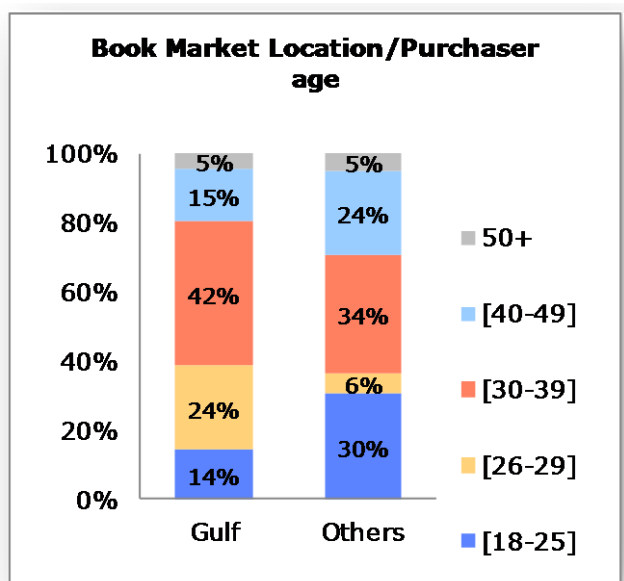
Book markets and Gender – Figure and Table Z1



	Frequencies and conditional percentages table					
	X: Book Market Location Y: Gender					
	Gulf		Others		Total	
	count	perc.	count	perc.	count	perc.
Female	162	77.1%	84	71.2%	251	76.5%
Male	48	22.9%	34	28.8%	77	23.5%
Total	210	100%	118	100%	328	100%

Approximately the same profile of male and female percentages are found for the two groups (Gulf and non-Gulf book fairs).

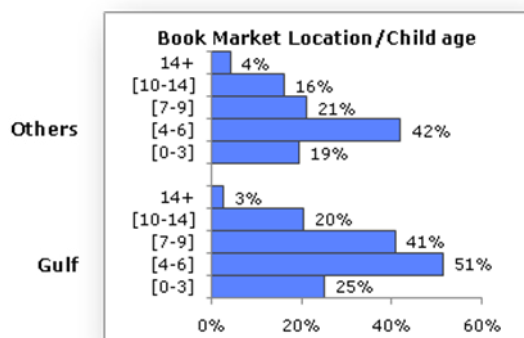
Book Market with Purchase Age – Figure and Table Z2



Frequencies and conditional percentages table						
X: Book Market Location						
Y: Purchaser age						
	Gulf		Others		Total	
	(count)	(perc.)	(count)	(perc.)	(count)	(perc.)
[18-25]	30	14.1%	35	30.4%	65	19.8%
[26-29]	52	24.4%	7	6.1%	59	18.0%
[30-39]	89	41.8%	39	33.9%	128	39.0%
[40-49]	32	15.0%	28	24.3%	60	18.3%
50+	10	4.7%	6	5.2%	16	4.9%
Total	213	100.0%	115	100.0%	328	100.0%

It is apparent from table above that there are slight differences between the customers' ages in both areas, where more young customers (18-25) are in the non-Gulf markets while there are more customers aged 26-29 in the Gulf markets. Interestingly, the customers aged 18-29 add up to around 40% in both areas. In addition, there is a higher number of customers in their forties in the non-Gulf markets. In both areas, children's book customers in their thirties have the highest percentages. The results can be used in marketing for customers in both areas, since in the non-Gulf markets the younger generation, who are often more comfortable in using technology (with the exception of Algerians), can be targeted through internet marketing and social media. The 24% of children's book customers in their forties in the Gulf markets reflects the nature of the more mature customer who can be more conscious and experienced with their choices.

Book Market Location and Child Age – Figure and Table Z3



Frequencies and conditional percentages table				
X: Market		Y: Child age		
	Gulf		Others	
	(count)	(perc.)	(count)	(perc.)
[0-3]	54	25%	23	20%
[4-6]	111	51%	50	45%
[7-9]	88	41%	25	22%
[10-14]	44	20%	19	17%
14+	6	3%	5	4%

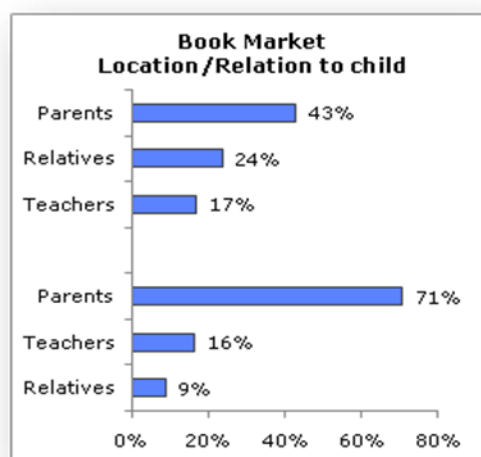
Both Gulf and non-Gulf markets have similar percentages of children's book customers buying for different age groups. The highest percentage was for book purchases for children of ages 4-6, while in the Gulf States there was a higher percentage for customers buying books for ages 7-9 than the other markets. In both markets the highest percentage of demand is for elementary school aged children's books (4-9). The results highlight the small differences between the markets when it comes to the target age group, and the fact that many of the customers in the Gulf had more than one child from different age groups and made multiple selections. Both groups' options peak at ages 4-6 and decrease gradually as children grow up.

Book Market Location with Relationship to the Child – Table and Figure Z4

	Frequencies and conditional percentages table			
	X: Book Market Location			
	Y: Relation to child			
	Gulf		Others	
	count	perc.	count	perc.
Parents	153	70.8%	51	42.9%
Relatives	19	8.8%	28	23.5%
Teachers	35	16.2%	20	16.8%

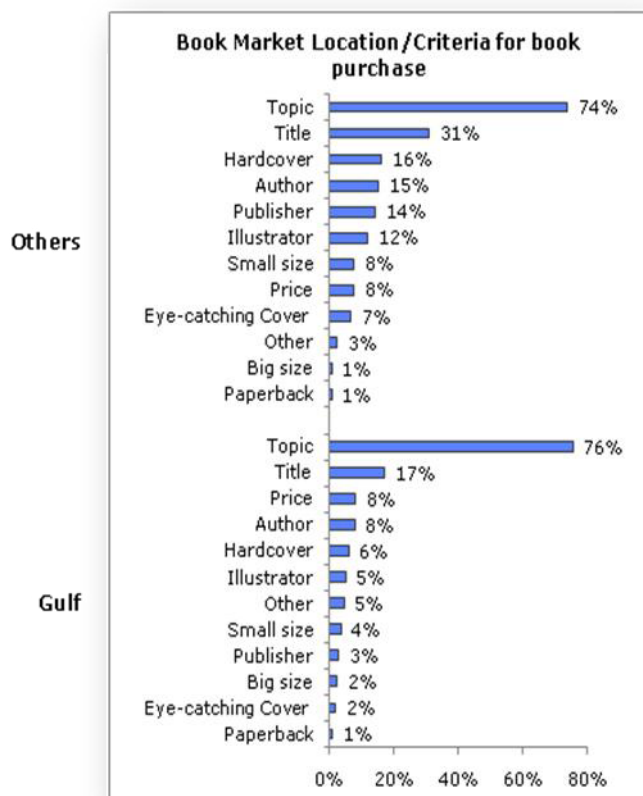
Others

Gulf



The results reflect that it is more frequent in the Gulf to see parents purchasing children's books in book fairs than other fairs in the other markets. More other relatives buy children's books in the non-Gulf market, reflecting the role of the extended family and the role that schools play in purchasing books, discussed previously in Chapter Four

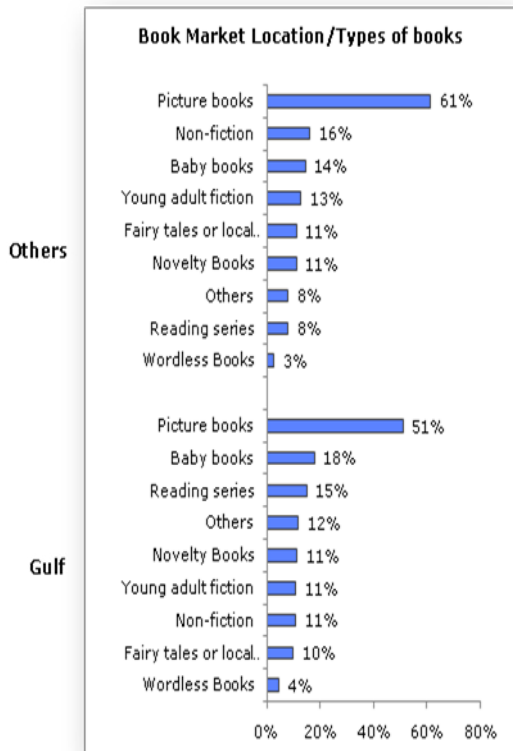
Book Market Location with Criteria for Book Purchase – Figure and Table Z5



Frequencies and conditional percentages table				
X: Book Market Location				
Y: Criteria for book purchase				
	Gulf		Others	
	(count)	(perc.)	(count)	(perc.)
Price	18	8.3%	9	7.6%
Topic	163	75.5%	88	73.9%
Hardcover	13	6.0%	19	16.0%
Paperback	2	0.9%	1	0.8%
Small size	8	3.7%	9	7.6%
Big size	5	2.3%	1	0.8%
Eye-	4	1.9%	8	6.7%
Title	37	17.1%	37	31.1%
Author	17	7.9%	18	15.1%
Illustrator	11	5.1%	14	11.8%
Publisher	6	2.8%	17	14.3%
Other	10	4.6%	3	2.5%

It is apparent from the figures above that there is no distinction between the Gulf and non-Gulf book markets when it comes to the criteria for book purchase. Topic is the main criteria for book purchase for the two groups, followed by the title. The customers in the non-Gulf area are slightly more conscious of the publisher, the title, illustrator, hardcover binding and the author (although this finding is dominated by the Lebanese customers in Beirut International Book Fair, as discussed above). The results reflect that customers in the non-Gulf area had more multiple choices than the customer in the Gulf States market, and are slightly more selective.

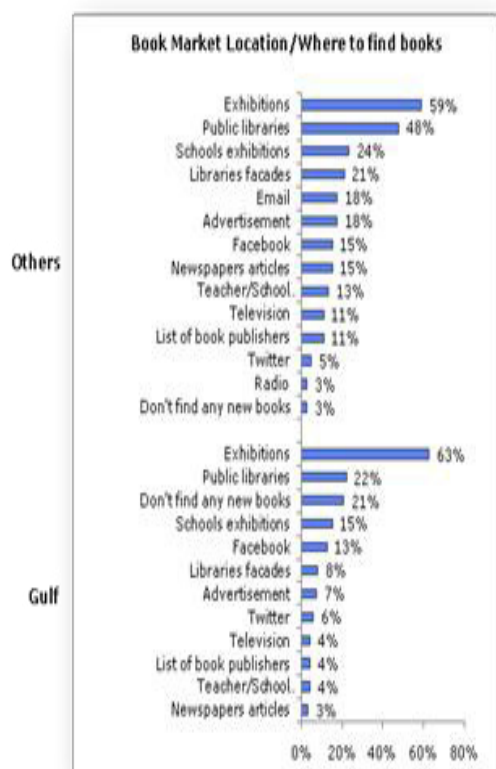
Book Market Location with Type of Book Purchase – Figure and Table Z6



	Frequencies and conditional percentages table			
	X: Book Market Location			
	Y: Types of books			
	Gulf		Others	
	(count)	(perc.)	(count)	(perc.)
Novelty	24	11.1%%	13	10.9%
Baby books	38	17.6%	17	14.3%
Fairy tales or local stories	21	9.7%	13	10.9%
Picture books	110	50.9%	73	61.3%
Wordless	9	4.2%	3	2.5%
Non-fiction	23	10.6%	19	16.0%
Reading series	32	14.8%	9	7.6%
Young adult	23	10.6%	15	12.6%
Others	25	11.6%	9	7.6%

The Gulf and non-Gulf areas are very similar in their book purchases, where the majority of customers in both areas intend to buy picture books. It is worth noting that slightly more customers (15% compared to 8%) in the Gulf markets are buying graded reading series and more customers (16% compared to 11%) in the non-Gulf markets are buying non-fiction. The difference is small, but highlights the movement toward graded reading series in the Gulf market more than elsewhere. This might be affected by the ATF project and the strong development in education being implemented in the Gulf States, where the use of different resources are promoted as necessary for educational development (including graded reading series in school and classroom libraries).

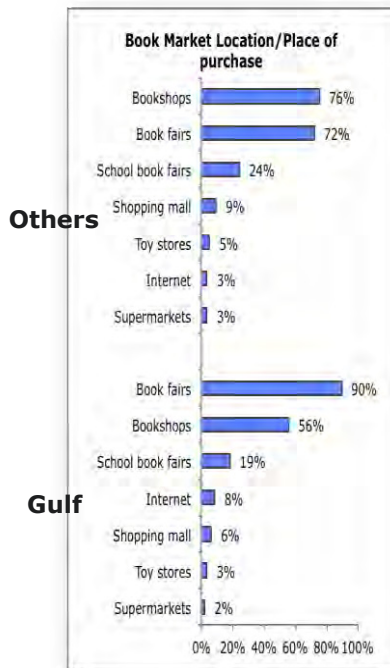
Book Market Location with Where to Find Out About New Books Z7



	Frequencies and conditional percentages table			
	X: Book Market Location		Y: Where to	
	Gulf		Others	
	(count)	(perc.)	(count)	(perc.)
Public libraries	48	22.2%	57	47.9%
School book fairs	33	15.3%	28	23.5%
Newspapers	7	3.2%	18	15.1%
Book fairs	135	62.5%	70	58.8%
Twitter	12	5.6%	6	5.0%
Teacher/School recommendations	9	4.2%	16	13.4%
Advertisement	16	7.4%	21	17.6%
List of book	9	4.2%	13	10.9%
Email	5	2.3%	21	17.6%
Don't find any	45	20.8%	3	2.5%
Bookshop	17	7.9%	25	21.0%
Television	9	4.2%	13	10.9%
Facebook	27	12.5%	18	15.1%
Radio	3	1.4%	3	2.5%

The Gulf and non-Gulf book markets had similar results where both customers find out about new books in book fairs, while public libraries play a larger role in the non-Gulf areas. It is apparent in the results in the graph that 21% of the customers in the Gulf markets do not find out at all about new books, compared to 3% in the other region highlighting the need to experiment with marketing children's books in the Gulf. 24% of customers in the non-Gulf markets find out about new titles from school book fairs compared to eleven in Gulf markets reflecting the role that school book fairs play in presenting books to customers in the non-Gulf markets, and mainly the Lebanese market.

Book Market Location with Place of Purchase – Figure and Table Z8



Frequencies and conditional percentages table				
X: Book Market Location				
Y: Place of purchase				
	Gulf		Others	
	(count)	(perc.)	(count)	(perc.)
Bookshops	121	56.0%	90	75.6%
Toy stores	7	3.2%	6	5.0%
Supermarkets	4	1.9%	4	3.4%
Book fairs	194	89.8%	86	72.3%
Internet	18	8.3%	4	3.4%
Shopping mall	13	6.0%	11	9.2%
School book fairs	40	18.5%	29	24.4%

Both bookshops and book fairs are the main outlets for buying children's books in the Arab markets, while book fairs are more prominent for Gulf areas. More customers purchase children's books from bookshops in non-Gulf areas. The results might be affected by the possibility of higher availability of bookshops in most of the non-Gulf region when compared to many Gulf States (there are no available accurate statistics to the number of bookshops in both areas), discussed previously in Chapter Three and Chapter Four. The data from both Gulf and non-Gulf areas are relatively similar.

Book Market Location with Reason of Purchase – Table and Figure Z9

	Frequencies and conditional percentages table			
	X: Book Market Location Y: Reasons of purchase			
	Gulf		Others	
	count	perc.	count	perc.
9.1 Help/encourage the child to love reading	144	66.7%	95	79.8%
9.2 Help the child to improve his knowledge of Arabic language	98	45.4%	79	66.4%
9.3 Cheaper than foreign books	8	3.7%	7	5.9%
9.4 Develop child's imagination	29	13.4%	37	31.1%
9.5 Help the child to become a good reader	93	43.1%	50	42.0%
9.6 Upon teacher request	17	7.9%	5	4.2%
9.7 Help the child to get better grades in school	25	11.6%	13	10.9%



While customers from both Gulf and non-Gulf areas buy children's books to encourage the child to love reading, more customers in the non-Gulf areas were keen to improve their children's enjoyment of reading. Even though helping the child to improve the knowledge of the Arabic language was the second choice in both areas, more customers in the non-Gulf areas chose it. There was a difference between both areas when it came to the choice "develop the child's imagination", where a much bigger percentage of 31% in the non-Gulf area chose it compared to 13% in the Gulf areas. The results demonstrate the preference of the Gulf customer seeking to improve the Arabic language competence compared to the customer in the non-Gulf markets who is usually proficient in a second language and bilingual early on in life and school (in Algeria, Tunisia, and Lebanon the use of French is very common in conversations). It is worth noting that what distinguishes the Gulf States is also the fact that English is usually taught as a second language.

Conclusion

The research attempted to demonstrate the purchasing behaviour and preferences of children's book customers in the Arab World through a series of questionnaires carried out in different book fairs. Book fairs are usually busy events where customers with children find it difficult to answer questionnaires. As a result, a good number of 328 questionnaires were successfully completed under difficult circumstances in the different Arab markets.

Women are the main children's book customers in the Arab World, with a ratio of 3 to 1, or 75%. The largest percentage is mothers in their thirties buying for children of mainly 4-6 years of age. Topic was the main criterion for choosing a book in the Arab World, while very few children's book customers selected publisher as a criterion. Most customers intend to buy picture books for their children. Book fairs are the main source to find out about new titles and to purchase books. The majority of the customers intend to buy books to help and encourage their children to love reading.

After analysing the data, it became apparent on the bases of the sample responses I have received that:

- There are no differences between male and female purchasers, despite the small sample of male purchasers
- Teachers generally, but not exclusively, seek out books for children 4-6 and 7-9 years old
- Most of the customers who chose price as a criterion for selecting a book are from Muscat, Beirut and Tunis

- There are slightly different results between markets and ages of children that the customers intend to buy for
- There are similar results between markets and types of purchase, with the Abu Dhabi market as an exception keeping in mind the small sample size and the market differences
- There is no correlation between relationship to the child and type of purchase where different customers were buying mainly picture books
- There are slightly similar results between markets and where to find books, with slight differences between book fairs and public libraries in some book fairs
- There are no apparent differences between the relationship to the child, the child's age, and where to find books
- There are slightly similar results between the markets and place of purchase, with book fairs and book shops as main outlets, and there are more online purchases in Abu Dhabi than in any other market
- There are no apparent differences between the relationship to the child, age of the child, reason of purchase, and place of purchase
- There is no apparent difference between the gender and reason of purchase

When comparing the Gulf and non-Gulf markets very similar results were found in both markets with slight differences in the ages of customers, age of child, relationship to the child (more parents in the Gulf markets), types of books, where to find books (more public libraries in the non-Gulf markets that already have more available public libraries), and why they buy books (more people want to develop the child's imagination in non-Gulf markets). None of these minor differences are important enough to change publishers' strategies.

The governments' efforts in the Gulf States, previously discussed in Chapter Three, are apparent in book sales numbers, which are rising in the Gulf book fairs, and the customers' interest in books, which is increasing yearly with the UAE as a prominent example.

The results from the research highlight the differences in the Arab markets while at the same time stressing the customers' similarities. The results confirm the crucial role that book fairs play in both promoting and selling books in the Arab World, the importance for sales of picture books in a publisher's lists, and the importance of the topic of the books.

Finally, the need for further studies is necessary to explore the children's book market in the Arab World in order to further understand and develop it.

Marketing Children's Books:

Mature *versus* Developing Markets

A great disparity exists between the way in which books are marketed in the West and in most of the rest of the world. The book publishing markets in the Arabic World are primarily developing markets whereas the Western English/European book markets are advanced and mature. A number of factors or variables influence the marketing environment and shape both the development and character of marketing in differing publishing environments. While conducting this research, and particularly after reviewing the questionnaires completed by Lebanese publishers, the research finds that marketing efforts used to sell children's books in the Arab World are far less rigorous, varied, or advanced than English language publishing markets. The comparative difference can be attributed to limited experimentation with marketing techniques, low budgets, and/or the small marketing teams, which target their marketing to the tried and tested avenues used in Arabic children's book publishing namely, book fairs and selling books to schools.

This chapter examines British children's book marketing in order to compare the British market with the Lebanese children's books market. If Arab children's book publishing and marketing were considered in isolation, the resulting study would not be as relevant nor would useful marketing tools be mapped for usefulness in the Lebanese market. A comparative approach allows for far greater analysis of the differences in marketing practices in different parts of the children's book publishing world. As stated in the Methodology proven British effective marketing techniques have been applied in the marketing of children's books in Lebanon in order to test their effectiveness. This research adopts these successful British mechanisms and adapts those to the Lebanese children's book publishing market, in order to seek to establish whether similar business and marketing steps applied in different language and marketing environments can yield similarly successful results. The chapter will discuss marketing theories, award-winning marketing campaigns, and the results of applying marketing techniques in Lebanon.

What can a comparative assessment of British children's book marketing reveal about marketing children's books more broadly?

The UK has a highly developed and competitive market for children's books. Baverstock observes that the UK has one of the largest mature markets for books, producing about 184,435 new titles in 2013 (2015, p. 6). The UK is an important market for children's books where for instance the physical children's book sales in 2012 increased 4%, "up to £233 million" (*The UK Book Publishing Industry in Statistics 2012*, 2014).

A comprehensive analysis of the British children's book publishers marketing techniques requires an examination of an array of marketing mechanisms implemented by publishing houses and measured by growth of print-runs and markets. The examination of the British market began by examining the successful marketing techniques.

The Market for Children's Publishing in Britain

The mature British market features well-structured distribution systems, including wholesalers, neither of which are a feature in Arab book markets. The wholesaler inclusion in the supply chain allows for purchases of large quantities of books bought in bulk at a relatively high discount, storing of books, and direct delivery to retail outlets (Baverstock, 2015, p. 448).

There is a large number of bookshops in the UK, according to The Booksellers Association (representing 95% of booksellers in UK and Ireland) in 2013 there were 3,746 bookshop members of The Booksellers Association (BA) and 987 bookshops independent of BA membership (The Booksellers Association, 2014) ranging from big multinational chain bookshops, independent bookshops, to discounted bookshops. Bookshops play an important role in the UK market, around 31% of the books sold in the UK in 2013 are sold through bookshops (The Booksellers, 2014). *The Bookseller's* annual survey in the UK noted that the "increase in online shopping was reported as one of the major challenges" (The Booksellers Association, 2014). Online shopping in the UK is increasing where "[o]n a total basis, sales were up 1.8%, against a 1.5% increase in December 2012" (The Booksellers Association, 2014).

The British children's book market is highly competitive, which forces marketers to be creative. Baverstock asserts that publishing is now run by the marketers whereas traditionally editors were responsible for the enterprise (2015, p. 6). Commercial pressures have changed the nature of publishing, with marketing departments now regarded as central to any British publishing house. This has occurred for several reasons, but central to the change is the competitive nature of the business, the need to be innovative to reach customers and raise sales, and the imperative of high sales. Marketing has become a "complex set of specific business functions, a strategy for profit making companies, a promotional tool for all kinds of organizations, and an academic discipline" (*Introduction to Sources and Strategies for Research on Marketing*, 2004, p. 3).

Marketing plays a main role in the success and the development of the publishing industry in the UK, increasing sales of the books to different locations, including supermarkets and chain stores. With the recent development of online reading devices the digital presence of books has affected the sales and marketing of books.

The invoiced value of UK publisher sales of books rose 4% in 2012 to £3.3 bn with a 66% increase in digital sales offsetting a 1% decrease in physical book sales. Digital sales now represent 12% of UK publishers' total digital and physical book sales. (*The UK Book Publishing Industry in Statistics 2012*, 2014)

The dramatic rise of digital books between 2011 and 2012 is a reflection of the new medium that is expanding but has only a slight effect on decrease volume of book sales compared to the percentage of market share. The decrease of only 1% of physical book sales when compared to the digital sales of 12% of total market share is a sign of an important market for publishers. Physical books in the UK are being marketed in many ways in order to keep a position in the market and increase sales especially to book-buying parents who believe in the importance of reading picture books to younger children. The online channels are being used to market physical books too. To this end, marketers require an array of information to determine strategy.

What makes marketing successful, and what kind of information does the marketing team need to develop a campaign?

Philip Kotler (2003), an American marketing expert, defines marketing as “a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and values with others” (Blyth, 2009, p. 6). What is clear in this definition is the importance of “value,” “needs and wants,” customers, and “market research” (Blyth, 2009, pp. 7-8). Those elements should be identified in the marketing techniques discussed and identified in the British children’s book market. The British marketers have access to a range of data through market research conducted by bodies like the Publishers Association and the Booksellers Association. In addition, there are ample experiences in the market that marketers can benefit and build on.

Digital marketing and project management expert Aaron Bogucki’s (2012) explanation of marketing includes the elements in Kotler’s definition, but puts them in a different frame. Successful marketing campaigns depend on understanding both the market and the product itself, a distinction that sets it apart from sales, where the objective is unit based and micro level. Marketers are always trying to come up with new ideas to increase sales. Bogucki (2012) stresses the importance of the five ‘Cs’: communities, conversation, collaboration, content, and commerce.

Every book has target customers, where some customers are willing to buy quickly and will create and start the buzz or hype around a particular book title, and other customers are much slower. According to Bogucki (2012) “communities” are made up of creators, contributors and laggards. Creators are those who are willing to try the new experience and help in creating the trend. Creators are important in a marketing campaign and such customers should be found early, and platforms should be created for discussion in which marketers listen, respond, invite questions, and talk to people. These focus groups can assist in targeting ideal book customers. Creators for instance are willing to read books by new authors while contributors prefer to read the same authors they know or the authors that friends recommend. Contributors are the group which follow the creators and consolidate a trend or buzz, while laggards need more time to experiment and buy new products usually after the buzz or trend has been developed.

A marketer should be able to reach the creator customers to create a word-of-mouth campaign. As Friend argues, marketing has a “customer focus rather than product focus”

and emphasizes the importance of analysing the customer with a “view of segmenting the market” (2004, p. 99). In most of the cases, adults are the customers of children’s books, purchasing the books for the consumers, children. For instance, in Britain high percentage of children’s books are purchased by adults coming from diverse groups (age, background, and specialty), making “the targeting of marketing very difficult” (Baverstock, 2015, p. 374). Baverstock adds that marketers should produce material, like leaflets, catalogues, and posters that can attract both the adult and the child, “appealing to ‘the child in us all’” (2015, p. 374).

Marketing children’s book differs in several ways from marketing adult books. Despite some general techniques in common, many details can differ. The medium that the child has access to is different from the ones for adults, since their exposure to social media is controlled by adults. However, children can have direct access to TV programmes especially designed for children.

“Conversation” includes the “brand voice”, where high importance is given to being authentic, attractive, engaging, and evolving. Social media are increasingly used by marketers to reach customers and prompt reactions. According to Blyth, “the main vehicle by which marketers focus their activities is the brand” (Blyth, 2000, p. 88). Building a brand and engaging readers is crucial for marketers. Blyth stresses that branding is not only giving a “catchy name,” but also includes a set of activities across the marketing mix (2000, p. 89). The 2012 Booksellers’ Conference hosted Mr. Elworthy from Nike shoes in order to stress the importance of marketing in children’s books, and the necessity of looking at other fields in order to apply new ideas to marketing books. John Dawis (2012, p. 5), a researcher, specifies that Nike in the UK has grown to be “mainstream fashion” with a “strong brand personality” where Dawis references Kevin Robert, CEO of the famous Saatchi and Saatchi for advertisement, who explains the brand loyalty of Nike as “loyalty beyond reason”, suggesting high levels of brand loyalty.

‘Content’ should then be analysed and enhanced through marketing messages that are compelling and can be easily shared (for example, books that are funny, odd, unbelievable). This can be recognized in the campaigns, discussed below, that children’s book publishers in the UK are using to engage readers in creating the cover and

contributing to changing the incidents in the books. Some examples are the online games, discussed below, for instance, created for books with the characters playing a main role in the game.

“Collaboration” has become increasingly important due to recent developments in the communication field, such as social media. Bogucki (2012) argues that marketers should identify core creative fans, allow the campaigns to be influenced, and discover tools through new social media. In this way, creators and collaborators can shape a campaign and take it to another dimension with their comments, expanding the scope of the network and “sharing” material to new audiences and sub groups.

“Commerce” should include measuring and disaggregating the data, including how the consumers are affected, and what new data are available for study. That is, what makes the data worthwhile is analysing and learning from it, amplifying social engagement, using multiple platforms, utilizing PR potential, and creating stories to bring characters to life.

The marketing teams focusing on the 5Cs outlined above are often able to reflect that effort in sales figures. In addition, marketing efforts have begun being recognized by the Book Marketing Society, which gives awards for the best marketing campaigns.

Award-Winning Marketing Campaigns

The “Book Marketing Society” in Britain gives awards to best book campaigns. In 2011 the award was given to Vintage’s *The Night Circus*, a title that “was one of the most successful debut books of 2011, achieving impressive TCM [total consumer market] sales in hardback. The stylish and innovative campaign focused on an online story-world, which attracted more than 13,000 users in the first two months” (BMS, 2012). Media and social media were used to push the sales of the book. The story-world was connected to both Twitter and Facebook, engaging children with the characters. The Vintage marketing team successfully worked with the five ‘Cs,’ reaching the communities through online media, establishing a conversation with children about the brand voice, collaborating with

children who were able to play with the characters and elements in the book, creating content that attracts, and measuring the data through online figures and sales numbers (commerce).

In 2012 the award for the best marketing campaign was given to Puffin's best-selling children's book, *Diary of a Wimpy Kid: The Third Wheel*. The Puffin marketing team encouraged reader responses by pre-testing the story line, then created a trailer built from the responses reaching 80k views; this resulted in 28k new fans and a 23% growth in sales (BMS, 2013). Two factors made this campaign successful; the first was engaging the reader and the second involved using social media to get exposure.

Baverstock stresses that "a website is an (if not the) most essential marketing tool for your business...often functioning as the hub of your wider involvement with online marketing..." (2015, p. 215). Both the Vintage and Puffin campaigns share the use of social media, engaging readers, and having direct results increasing book sales.

The mature UK market has the advantage of time to develop and integrates innovative marketing techniques. In addition, these award-winning campaigns, in tandem with successful marketing, involve innovative and new methods. Classic marketing techniques, such as word-of-mouth, have proven to be successful overtime and are still being used in the UK children's books market.

Popular Marketing Techniques in the UK

Word-of-Mouth and Social Media

Word-of-mouth has been a key element in the success of many bestselling books. The US's "Book Publishing Report" (2007) points out that positive reviews from friends and word-of-mouth advertising are more important factors in successful sales than the quality of content, which comes in second place. In the UK and elsewhere, the *Harry Potter* series has benefited greatly from word-of-mouth recommendations and the "buzz" created not by

marketing departments but by the average reader. Publishers target the people who can help spread the word and benefit from critiques by bloggers and school children. Publishers send those excerpts or whole books, and invite them to authors' fan pages. Given the degree of competition in the market, and the often limited space in bookshops for children's books, "marketers grope for the ever elusive word-of-mouth" (Weich, 2010).

Some promotional campaigns actively encourage word-of-mouth recommendations. For example, research carried out by Book Marketing Ltd showed that while World Book Day (WBD) increased children's book sales by 71%, the sales in adult fiction rose by only 13% (Holman, 2004). Therefore, the 2005 WBD encouraged adults to recommend a book to a friend in order to receive a discount on books on that day using free postcards, e-mails, and text messages. In 2014, a similarly successful campaign was recorded, where "[s]ales during the week of World Book Day helped increase the children's book market by £1.12m, according to WBD director Kirsten Grant, giving a "fantastic" boost to the industry....Another success was the WBD website, which received 38% more visits in March 2014" (Eyre, 2014). One pound tokens were distributed to children to celebrate WBD and the book *Hello, Hugless Douglas!* by David Melling (Hodder Children's Books) was the highest selling book, reaching 107,103 copies in seven weeks (to 5th April). "The book was chosen as a WBD title at the request of retailers" (Eyre, 2014).

According to Thornton (2012) of Mostly Books, independent bookshops are crucial to publishers, since if they are behind a title they can sell twenty to forty copies at a higher price, thus presenting bigger margins for the publishers. In addition, people who buy from bookshops are the ones who support word-of mouth.

In addition to the traditional methods used to increase word-of-mouth, like book samples, advertisements, and campaigns, recently social media has been increasingly used as a word-of-mouth tool. Cost effective and efficient, social media can effectively connect readers to a publisher's products.

Mumsnet.com, for instance, is a website with a variety of products and articles for mothers. Reviews and articles are found in all sections, ranging from pregnancy, baby to money and work. In Mumsnet.com a section is dedicated to children's books where some

books are reviewed and rated by mothers. In addition, some publishers send free samples for mothers to read and evaluate and the website would specify if a mother received a free children's book to rate and review. "In certain cases companies with new-to-market products ask Mumsnet to recruit Mumsnetters to test their products". "Mumsnetters" are paid and the publishers send free children's books trying to initiate a word-of-mouth buzz around titles (*Mumsnet Reviewers*, 2014).

Penguin, one of the leading children's book publishers in the UK known for their innovative and effective marketing campaigns, has tapped into the power of new media by promoting its books via: Google+, Twitter, podcasts, blogs, Youtube, Facebook, Pinterest, and Soundcloud. Facebook posting helps to give a personal face to the company by speaking directly to the reader and attracting new readers. Readers have been asked to take part in editing and production (and get a free book):

"Are you a book blogger? Are you on Google+? Get involved with our proof group!" (Penguin, 2012); learn about how book covers are made: "Ever seen a book jacket come to life? Well now you can! Watch our video of two Penguin English Library books, with secret gems hidden just beneath their surfaces" (2012); and see inside the publisher's office (2012).

Facebook has been used by most publishers, including Walker Books and HarperCollins. Walker Books, a leading independent publisher of children's books in the UK, exploits the connections of Facebook and its authors' fan pages to post articles, trailers, and news about its award-winning writers such as Patrick Ness, and to receive comments from readers. Walker tried to promote the author by creating a bigger list of fans while engaging them in conversations on Facebook. One of the factors that make Facebook successful is the ability of the medium to engage readers not only with the publisher or author, but also with each other. HarperCollins offers online special deals in headline-grabbing style: "Turn your reluctant reader into a bookworm. Get 10 great e-books for just \$20!" (2012). This HarperCollins campaign stresses both word-of-mouth and the special offer mechanisms, combined to market their books. In addition, the campaign works on psychological issues relating to parental and educators' fear and ambition to help their reluctant readers become better readers. Some campaigns that include competitions are recently using a combination of social media with other marketing tools.

Competitions

A variety of competitions have been used by publishers in the UK for many years. Competitions are used in a variety of ways and are integrated with campaigns. Walker Books, established in 1980 with over 34 years of experience, is a case in point.

In 2012, Walker Books' marketing team created the picture book picnic campaign, in which readers entered an online competition on their "picture book picnic" website, and won picnic bags filled with picture books, stickers, postcards, and posters. Walker Books have many other competitions in which the author and illustrator discuss making their books and the readers comment, or the publisher comments on a book and readers are invited to interact.

Competitions are also launched on twitter, where for example Walker asks readers to re-tweet a picture. Walker books' marketing team (2012) mentioned that they could get up to 100 cover re-tweets, which were viewed by around 800 people, then a real marketing measure of success. The marketing team also post email competitions, in which they send their contacts emails about new titles and they are asked sometimes to enter a website or even just comment in order to win.

Usually Mostly Books, the Abingdon bookshop, places a poster and items in the bookshop window if there is a special celebration like the twenty fifth birthday of Willy, a famous children's book character. To celebrate the occasion, the publisher sent competition packs for the bookshop. Children came to Mostly Books to collect their pack and were able to enter the competition (Thornton, 2012).

Television

Television (discussed previously in Chapter Two and Chapter Five) is another highly-viewed medium and an expensive tool for marketing, but some publishers nonetheless benefit from it. The few children's books that are transferred to television programmes end up promoting the titles and increasing book sales. The Charlie and Lola titles, for example, were licensed to the BBC and that played a role in increasing the sales of the physical books and in creating new titles based on the series by author Lauren Child. According to the Bookseller, sales of "books for the film of *The Golden Compass* and growth of its

school book-club business helped Scholastic UK to increase its sales by 15% in the year to 31st May 2008” (Ryan, 2008).

Television series have shown a positive influence on sales in many cases. What makes television important is the fact that it is a medium to which most children are exposed. Many series have proven to be successful since the viewer connects with the character and enjoys watching them again. The success of children’s cartoon series is transferred to merchandise, including clothes, toys, and books. TV series can be based on successful sales of children’s book series like Charlie and Lola, or a children’s book is created after the success of a cartoon series like Mickey Mouse for instance.

Developments of the mass market and character licensing have increased publishers’ profits. “With their backlist of character titles, publishers are well placed to take advantage of this opportunity” (Baverstock, 2015, p. 373).

All the marketing activities demonstrate publishers’ efforts to link with, and establish bonds between, their readers, find new loyal customers, and promote their books. Using television to market books can be very expensive, while many printed materials can be cost effective.

Printed Advertisement and Printed Material

Print advertisements, on the other hand, are more affordable than television, and magazines and newspapers are sometimes still being used by publishers in the UK for advertisement. For example, Walker Books places half and full page advertisements in the *First News*, “the award-winning weekly national newspaper for children aged seven to fourteen with over 1 million readers every week” (*First News*, 2014), magazine to promote new series or titles and launch competitions using those printed advertisements.

Printed materials are used to promote books by the publisher to the trade customers. Bookmarks, postcards, brochures and other materials are still used in the launching of the new character or a book, in a book signing sessions, or marketing campaigns. Catalogues are still printed by many publishing houses, which often feature the new titles with a highlight on the cover or in the middle of the catalogue. Catalogues are sent to bookshops, the media, schools, libraries, and to international publishers to whom the UK publisher hopes to sell rights. It is worth noting that in the previous couple of years, the use of printed material has decreased in some areas to reduce costs for publishers. For instance

UK publishers that we work with in Asala Publishers are not sending paper copies of their catalogues but are sending them as online links and files.

Rights catalogues are also printed for special book fairs and occasions like the Frankfurt Book Fair and Bologna Book Fair, where the publisher highlights some new titles and provides a summary of them in English with the book specifications. These catalogues are usually sent prior to the book fairs, so that the publisher can view the titles of interest, or are sent afterwards as a reminder of the books viewed in the fair or that the publishers did not have the chance to view. Selling translation rights is important to UK publishers. As a result, publishers tend to create promotional items, rights catalogues, and participate in international book fairs. UK publishers tend to have relatively large stands in international book fairs, with a special team devoted to promoting and selling rights to other publishers around the world.

This has been proven to be a successful strategy, because English is an international language that is easy to evaluate and translate from. In addition, UK publishers have extensive contact lists of publishers around the world with whom they have had previous commercial deals. The fact that the UK publishing industry is rich with many titles and different styles also makes it appealing to publishers from other parts of the world.

The marketing and sales teams also prepare printed materials for their new titles that will be published in the next season. The team sometimes presents these titles to supermarkets and chain-stores hoping to make a special edition of those titles for them. The sales team also travels to different bookshops showing them their new titles and hoping to place a substantial number of pre-orders.

Bookshops

In bookshops, marketing is focused on the point of sale, putting books in the hands of the purchasers. In the UK publishers often use bookshop windows to promote books. Publishers pay to place their books in the window or on a certain attractive shelf or table in the bookshop. Marketers can choose to place books in the window with other books or can go as far as decorating whole windows devoted to specific books, where posters, enlarged characters, and stacks of books are presented in the windows to attract and promote the title. Publishers usually pay for spaces in bookshop windows, since they have proven to be successful and increase sales. For example, the Mostly Books bookshop window does not

have many books due to the direct sunlight it receives, but the books are replaced by posters that are either chosen by the shop itself, or sent by the publishers (Thornton, 2012).

Book promotions are another way to sell more of an item and even reduce old stock. Additional trade discounts are also given to bookshops for new successful titles and for remainders or overstock. Publishers can have special offers on their books in the bookshops they work with frequently or in special chains of discounted bookshops. For example, “The Works”, is the UK’s leading discount bookshop, with 300 stores around the country, sells books, toys, gifts, stationery, and arts & crafts. Products sold at The Works are at discounted prices. The Works shops sell more than 40,000 different products every year, where many books from different publishers are sold in the stores at discounts (The Works, 2012). Discounted bookshop chains have been successful in the UK and one of the main signs of success is the spread of the chains. Promotions and special offers attract customers and increase the sales for publishers since publishers need to ensure turnover, moving the stock, and increase printing quantities which have a direct effect on decreasing the costs of printing per book.

Bookshops and publishers also make special offers, such as three books for the price of two, in the bookshops or online. Waterstones regularly creates times for special offers on children’s books. A spokesman for Waterstones shared that the timing of these promotions is targeted to coincide with children’s school breaks. For example, the 3-for-2 offer is particularly effective during half term week (Campbell, 2012). The success is proven by the fact that publishers place the 3-for-2 offers again and again in bookshops.

In addition to the 3-for-2, publishers can support bookshops in many ways. For instance, Mostly Books, a small independent bookshop in the UK, is visited by sales people who sometimes represent up to thirteen small publishers, saving publishers the costs of single visits, in addition to keeping the bookshop updated with new titles. Publishers can help bookshops by supplying them with previously signed copies of books. For instance, Mostly Books sell online signed copies, which are popular (Thornton, 2012).

Book Signing Events

Publishers help bookshops by organizing book signing activities. Book signings are important to Mostly Books, but the events take a lot of effort where Mostly Books can get an average of twenty to thirty customers per signing (Thornton, 2012).

One of the most successful book signings in Mostly Books was the *Winnie the Witch* signing event, in which the illustrator went to the bookshop's garden and demonstrated how he illustrates. Around 100 people attended this event. Other publishers, such as Moonlight for example, sent the bookshop activity sheets and the children came and completed the activities in the shop (Thornton, 2012). Events are important for bookshops in general and Mostly Books in specific since patrons often buy other books in addition to the signed copies.

Publishers organize and prepare carefully before book-signing events in bookshops or during festivals, and market them to ensure a good audience and sell a large number of books. For example, Chapter One Bookshop (www.chapteronewoodley.co.uk) in Reading holds books signing events for children every fortnight (*Independent Bookshops in South East England*, 2011). According to Baverstock, book events and festivals “can prompt significant sales” (2015, p. 305).

Book Festivals

Book festivals are very important in Britain. In 2011 Tivnan and Richards point out that there are many book festivals in the UK that “cater for almost every taste” with a “conservative estimate of 250” for the whole country. Tivnan and Richards (2011) discuss the Sunday Times Oxford Literary Festival. The festival is visited by tens of thousands of people and has in excess of 550 author events over nine days in April. Sally Dunsmore, the festival director, pointed out that for the year 2011, partners and sponsors wanted to be involved, which was not the case for previous years (Tivnan and Richards, 2011). The example here illustrates the increase in popularity of festivals in the UK in general and specifically the Sunday Times Oxford Literary Festival. The festival management stresses the importance of booking authors who can guarantee a crowd.

Festivals also have partnerships with bookshops. For instance, the Oxford Literary Festival and Blackwell's bookshops organize official book signings. Bookshop partners sell and stock book copies for the events and speak with between 120 and 140 publishers to place orders. Zool Verjee, Blackwell event manager points out that “[t]here's a real presence for our shop before and during the festival” since people want to order signed copies in advance, highlighting the importance of signed books and the events to UK readers (Tivnan and Richards, 2011).

Some titles become very successful so the publisher sometimes experiment with special editions and promotions to generate more sales.

Special Editions and Promotions

Special editions and different sizes of the same book are printed in the UK to target different demographics and different age groups. These offers can either be made by creating limited quantity of a special format of the book, or by making cheaper smaller sizes. In 2010 Puffin celebrated its seventieth birthday by publishing six exclusive and special editions of their classic books designed by cultural figures. The titles were priced at one hundred pounds each. The books were packaged in a Perspex slipcase with the title of the book and the designer's name engraved. Anna Billson, art director at Puffin, believed in the success of these books and the plan for them to be collectables. She added that the books would appeal to fans of the artists, design and book lovers, and collectors (Gallagher, 2010).

The Gruffalo is one of the most famous UK children's books, and many versions of it can be found online. There are the large hardcover books, smaller board ones for younger children, interactive books with music, the book with an audio CD, and the book with a small 'Gruffalo' toy.

Promotional items, like the small 'Gruffalo' toy given for free with the book, attract consumers and particularly children to buy that product. With extra items provided, people feel that they are gaining more from the product. Some of the items given for free with books can be stickers, smaller books, and postcards.

Promotional items are popular in supermarkets, with some supermarkets ordering special editions of books.

Supermarkets

Marketers and sales teams try to target supermarkets with their forthcoming titles, hoping for a special edition to be printed. This is due to the fact that supermarkets and chain stores in the UK are effective and generate high book sales. According to the 'Bookseller', Tesco was the first to launch a supermarket book club in May 2007 in partnership with Random

House (Neill, 2007). The store and the publisher selected and promoted a title every month with exclusive content and branded bookmarks. Due to the success of book sales in supermarkets, the stores are promoting books in many ways with extra features that attract customers. Supermarkets in the UK are creating book clubs to attract customers, creating a ritual of association so that the customer base increases and readers come again every month and buy the next selected book. The Reading Club, which “was formed to offer a unique reference point on starting and running your own reading and book club”, stresses that the influence of book clubs “both amazed and delighted the publishing industry...such is their power that other enterprises have decided that they want a slice of this reading group cake” (Cohen, 2013). Tesco offers notes and reviews in its website and magazine and “aims to make choosing a book as simple as buying a pint of milk or a can of baked beans” (Cohen, 2013). Supermarkets are trying to rely on partnerships with UK publishers to produce books and encourage readers to come back for more.

Another vindication of this approach is that Sainsbury's book sales grew by 27% in 2010 despite disappointing wider sales. Sainsbury's head of book sales Phil Carroll said “it was an exceptional performance driven by the right offer across the right books” (Neill, 2011). The evidence suggests that with the decrease of the number of bookshops in the UK market, supermarkets are becoming more powerful, especially when sales are associated with special offers, promotions, and attractive book displays.

Supermarkets have a significant role to play. Asda supermarkets in the UK launched a book club in 2008 with titles from Hachette publishers. Titles were selected every month to be sold at a discounted price and promoted in Asda's 347 UK stores. Each store featured a metre-wide drop fixture to highlight the books, and Asda promoted them online through their book retailing website that offered 300,000 titles (Graeme, 2007). According to Asda book buyer Steph Bateson, this was done “to build on the credibility we have gained in books” in the past few years, to guide people to the “right kind of books”, to work on recommended reads which have proven to be successful in the past, and to make it simpler for their customers to browse, unlike a typical bookshop (Graeme, 2007). This again highlights the importance of chains in promoting titles, helping them to be viewed in many of their stores and online, and increasing sales figures through customers who go to supermarkets often. But the role of supermarkets as well as bookstores is changing too with the dominance of Amazon. According to Clark and Phillips

[i]n consumer publishing, a big order from a supermarket can still put a book among the bestsellers, and high street booksellers remain important for the

visibility of books. But Amazon has taken market share for print and come to dominate in the area of e-books. (2014, p. 255)

School Book Clubs

Some publishers have their own book clubs, as well, with Scholastic especially known for its book club. According to the Bookseller (2008) in 2008 the “publisher's core publishing” and school book-club sales each went up by about 40%. On their book club website, *My School Book Club*, Scholastic (2012) promotes their club by calling it “The First Ever No Hassle School Book Club”. It is marketed as new, easy, online, free, and rewarding. With no money to collect and no magazine to distribute, every parent can access the website and pay by credit card. Customized websites for every school are created with the school's name. Scholastic provides the school with leaflet templates and emails to tell all the parents. Every time a parent orders, the school gets 20% of the value of that order's books for the school library. One of the main reasons for the book's club success is that it is easy for customers to use and it benefits the schools.

Schools

Scholastic also makes a big effort in the school market through school book fairs. For example in the Bookseller (2008) Kate Wilson, the former M.D. Scholastic Group, points out that Scholastic delivers to 22,000 book fairs a year. Schools are a big market for publishers in the UK, and publishers have different ways of targeting them. For example, Walker Books UK has an employee, especially for schools and libraries, who creates lesson plans based on books and sends them to schools. Another route is adopted by Penguin who launched book signing events for authors in schools. The process is as follows: Penguin sends a letter to the school stating their plans and how much money the children will need when they attend the event. Boxes are packed with materials that the school can use to promote the author, like posters and pins for example. Signing events are prepared in advance, and are well organized to optimize the meeting's outcomes for educators, readers, publishers and authors alike. In addition to schools, there are organizations in the UK interested in promoting reading and that have purchasing power such as Bookstart.

Institutions

Institutions that promote reading, like Bookstart, place large orders with publishers and promote the books that they select. Books are selected from publishers to feature in the “starting pack”, which generates sales for the publishers. In 2013-14 three million books were distributed to children by Bookstart (*Bookstart Impact Statistics*, 2014). Prior to starting school at two key ages, children are offered by Bookstart the gift of free books “to inspire a love of reading that will give children a flying start in life” (*About Us*, 2012). Bookstart has impact on families where for instance “27% of parents know more about how to read with their child since receiving their Bookstart Baby Pack, increasing to 46% of Bookstart Treasure recipients” and “71% were reading books more with their children” (*Booktrust Impact*, 2014). In addition to free books, parents are given support and guidance on ways in which to promote reading, and a resource to share books, stories and rhymes with their children online. Online resources are provided where several books are posted online for free to be used by parents with the approval of the publishers. Similarly, the recommendations by Booktrust help increase the sales of the books. “Nielsen BookScan General Retail Market figures for the week ending 28th February showed that the twelve titles selected by Booktrust as “recommended reads” sold 39% more copies than the previous week” (Holman, 2004).

In the UK there are numerous creative ways of marketing books that are constantly being developed. Putting effort into marketing has driven the sales of books higher in that country, which shows the importance of trying to come up with new ways to promote books (and tempt the readers to buy them).

The research findings suggest that publishers tend to select particular titles to market strongly and a far greater effort is made to increase these books’ sales. The decision tends to be made on the bases of available budget, author’s fame, or publishers’ existing expertise in niche markets or subfields of children’s books (fantasy or horror for example). In addition to publishers, bookshops work on several activities to market books, increase sales, and invite people to visit their bookshop.

If these activities are applied in the Arab market, will they yield the same result?

Applying UK Marketing Techniques to Lebanese Children's Books

The Arab World is still developing its publishing business in general, and this is especially true in marketing and distribution. Marketing Lebanese children's books is still limited to school visits, free samples to schools, special offers on books, and selling at book fairs. The results from the publishers' questionnaire in Chapter Two highlight that few publishers market books through bookshop windows, articles in newspapers, social media, and television. Looking at some of the marketing techniques used by UK publishers above demonstrates the gap and difference between both markets in terms of the effort involved and the diversity of the techniques administered.

Hashem considers the impact of small budgets and profit margins that Arab publishers have, and that marketing is the area that suffers due to lack of budgets (2010, pp. 55-56), while Eschweiler and Geohler stress that limited marketing diversity affects distribution in a negative way, especially failing to include internet sales and e-payments (2010, p. 5). The results of this study highlight the need to experiment with marketing techniques in Lebanon in order to come up with results and strategies needed to develop children's book publishing and marketing in the Arab World.

Not all successful British techniques can be applied and tested in the Arab market. For example, a book launch on Twitter needs a reading culture that is highly knowledgeable of the author and willing to follow him online. The use of Twitter is also not as widespread as Facebook in the Arab World. Accordingly, the book launch technique might be experimented using Facebook. Christmas is a peak time of the year to market and sell books in the UK. Although UK publishers apply many marketing techniques to promote books during this time of the year, this is not replicable in Arab countries due to the majority Muslim population there.

Applied research is defined by Saunders et al. as "a research that is of direct and immediate relevance to managers, addresses issues which they see as important and is presented in a way which they understand and can act on" (2000, p.3). What is important in this part of the research is identifying successful marketing techniques that can be used in the Arab World in order to develop the publishing industry, increase sales, and reach readers.

Saunders et al. argue that the purpose of applied research is to better understand a “particular business or management problem”, find solutions to problems, find information relating to a specific problem, and produce “findings of practical relevance and value to manager(s) in organization(s)” (2000, p. 3). Being a manager in Asala allows me to apply marketing techniques to children’s books published in Lebanon and record the results during a whole year.

Process

Children’s books are usually targeted at specific age groups. At each level, books are characterized by a similar number of words and space for illustrations:

1. Baby books (age 0-3)
2. Beginner readers (age 3-7)
3. Elementary level readers (age 7-9)
4. Intermediate level readers (9-12)
5. Young adults (age 13 and up)

Asala Publishers publishes very few baby books and young adult books; as a result, books from these categories were not tested with marketing techniques. The initial sample consisted of a book or book collections from different reading levels for every marketing activity or set of activities.

In order to provide a transparent control group or element, two books were chosen from each level, and the marketing methods below were applied to one of the books and the results on sales were recorded. Some results were recorded over a short period of time (a season, during a book fair, in a bookshop, or after the advertisement has been placed for a month), while others were recorded for about three months.

A different book selected from each of the three levels was not marketed and is referred to as “non-marketed book”. The sales results of the marketed books were compared against the sales of the non-marketed books (books for similar age group and selling price), the sales of previous years, and the involvement of Facebook fans.

Marketing to New Channels, and Developing Existing Ones

The table below includes the activities or marketing techniques applied, the books or author that the activity was targeting, the age group that the books belong to, the objectives tested, and the results. In addition, the activities will be discussed in more detail later in the chapter.

Applied Marketing Techniques- Table 1

Name of Book(s)	Age Group	Activity	Objectives	Results Summary
		Activate Facebook	To post more than three activities a day on Facebook group to increase the number of fans (for more than more than two fans a week) in three months.	Increase of members: one to two members a day versus two a week previously
Series by Sana Harakeh	7-9 and 9-12	Author's fan page	To invite fans to the author's page and share pictures and activities in order to increase book sales for three months duration.	No increase in sales
Shinga Binga	7-9	Editing cover	To invite fans on Facebook to choose the title and cover of the book, in order to increase the sales of the book more than the non-marketed books, for the duration of three months.	No increase in sales and minimal responses
		Competition	To start a competition campaign on Facebook, to increase the sales of the books more than the non-marketed books for the duration of three months.	Minimal involvement and no increase in sales
		"3 for 2"	To provide the bookshops with "3 for 2" offers on books for a duration of three months, to increase the profit of the sales of books.	No increase in sales and bookshops returned the books

Name of Book(s)	Age Group	Activity	Objectives	Results Summary
Kossaw aNashat Idafi	6-10	Promotional Item	To offer an extra free colouring pencils with the books, to increase the profit of the books for the duration of the book fair.	Increase in sales 33% and increase in profit 14%
		School Book Fairs: Book Promotions	To place set of books on high discounts, in order to increase the profit from selling the books compared to the non-marketed books	Higher sales got rid of remainders but did not increase profit
		Free samples to Television and Newspapers	To send books to TV stations and newspapers, to increase the sales of the books more than the non-marketed books for the duration of a month after the books have been on TV or the newspaper.	Books hosted on national Lebanese TV, no increase in sales and newspaper no response
		Catalogue	To highlight two books in the middle of the catalogue, to increase the sales of the books compared to the non-marketed for the duration of three months.	No increase in sales
		Bookshop Windows	To place books on bookshop windows, to increase the sales of the book more than the non-marketed books for the duration the event (books on windows)	No increase in sales

The Use of Facebook

On October 10, 2014 Asala Publishers informed its fans and friends on Facebook about Asala's plan to market books and the need for the fans to be part of the Facebook group and become involved in several activities. The group started with 1,628 members, and added thirty members after twenty-four hours, rising to a total of 1,658. Fans have shown interest in taking part in Asala's group activities and pictures. A picture of the Asala team working (which is the first



attempt) had thirty-three likes and eight comments on Facebook, which is better than many book cover photos, which usually reach around fifteen. However, thirty-three is around 2% of 1,628, and is not a significant number; there is a need for more involvement to reach a minimum of 5% in the future. Daily posting on Asala Publishers group increased the members. Before the offer, the Asala Publishers group added around two new members a week, while greater activity on the group increased to an average of one to two members joining the group every day.

A fan page for an author was created and maintained for a period of three months on Facebook. Members of the Asala Publishers group were



invited to join the fan page. News about the author and the new titles were posted on the fan page. However, the results did not have any direct effect on book sales, and Asala

Publishers did not receive orders and requests for books by the author. In addition, few people followed the author's fan page (when compared to Asala Publishers members).

Facebook fans were asked to take part in the editing and production of new books on Facebook. In addition, readers learned on Facebook about how book covers are made. The comments on the covers were very minimal (4% of the group members). In addition, getting people involved in editing the book cover did not increase the sales of the book.

Competitions were posted on Facebook, in which the first five readers to comment on the cover picture won a free copy. The competition did not increase sales of the book, and the same people replied most of the time.

Special offers



“3-for-2” offers were prepared to be sold in bookshops. Stickers were printed and placed on the books, in addition to preparing the group of books to be included in the offer.

Bookshops were hesitant that this offer might skew their stock, and after trying for three months the bookshop returned the quantities and asked to stop the offer.

Promotional items (colouring pencils) were offered with books. Children loved the fact that they have free colouring pencils. The books that had these offers sold 33% more than the other controlled titles. There has been also an increase of 14% in profit based on the quantities sold. As a result, the promotional item offer can be used by publishers to increase the sales of books.



Special offers made during school book fairs had positive results. Children preferred buying cheaper books (especially in school book fairs with children of middle to low income families), the sales results helped reduce the stock, and children were happy to be able to afford several books rather than one (if they had money). The fact that school book fairs are in the same country, with minimal accommodation and travel expenses, and usually are free to participate in (most of the time the schools ask for a percentage of the sales ranging from 10% - 20%), lowered both the cost and the risk to the publisher. Customers who were offered special promotion on prices of books tend to buy more items from the same publisher, thus increasing the sales.

عندما تغضب، من دار أصالة، يفوز بجائزة، أفضل إخراج

سجلت دار أصالة فوزها بجائزة أفضل إخراج في مسابقة "عندما تغضب" التي تنظمها قناة تلفزيون لبنان (Tele Liban) في إطار برنامجها التعليمي للأطفال. وقد فازت دار أصالة بجائزة أفضل إخراج عن فيلمها "عندما تغضب" الذي إخراجته الفنانة اللبنانية هبة السعيد.

وكانت المسابقة تهدف إلى تشجيع المواهب الشابة في مجال السينما، وتمثلت في تقديم فيلم قصير مدته 15 دقيقة. وقد شارك في المسابقة عدد كبير من المخرجين الشباب، وقد تم اختيار فيلم "عندما تغضب" كأفضل إخراج.

ويذكر أن دار أصالة هي دار نشر متخصصة في نشر الكتب للأطفال، وقد تم تأسيسها في عام 1995. وتتميز دار أصالة بنشرها لكتب عالية الجودة، والتي تتميز بأسلوبها الفريد في تقديم القصص للأطفال.

مواضيعها التي تحاكي الطفل وكل ما يحيط به مصنف الإصدارات الأكثر تميزاً

قصص، دار أصالة، تفوز في، عربي، 21، وتبلغ لائحة الشرف

لقد تم اختيار دار أصالة كأكثر دوائر النشر تميزاً في مجال النشر للأطفال، وذلك بفضل مواضيعها التي تحاكي الطفل وكل ما يحيط به. وقد تم اختيار دار أصالة كأكثر دوائر النشر تميزاً في مجال النشر للأطفال، وذلك بفضل مواضيعها التي تحاكي الطفل وكل ما يحيط به.

وتتميز دار أصالة بنشرها لكتب عالية الجودة، والتي تتميز بأسلوبها الفريد في تقديم القصص للأطفال. وقد تم اختيار دار أصالة كأكثر دوائر النشر تميزاً في مجال النشر للأطفال، وذلك بفضل مواضيعها التي تحاكي الطفل وكل ما يحيط به.

Book samples were sent to television channels, radio stations, and newspapers to encourage reviews. A deal was made with the Lebanese official television channel (Tele Liban), and a series of books were read during their children's programme. The marketing method did not have any effect on sales. The free samples sent to the newspapers were not published in most of the time. The very few books or an author's collection of books discussed in newspapers had no recognizable effect on sales. It is worth noting that the national television channel (Tele Liban) is not widely viewed by Lebanese.

Developing Existing Methods

Asala Publishers' catalogue was printed highlighting two titles in the middle (this strategy used on two books only, placing each cover in the page in the centre of the catalogue). Highlighting book covers in the middle of the catalogue had no effect on sales.



Asala Publishers' team was able to place its books in some bookshops' windows. The sales of these books were not affected, and did not increase. The results are also similar to the results from the bookshop interviews, already discussed in Chapter One, and this method had no apparent effect on sales.



Marketing to New Channels

Asala Publishers' marketing team requested meetings with chain supermarkets, hoping to produce a special edition of book titles for them. The two large chain supermarket stores in Lebanon did not accept meeting the marketing team, and rejected the idea of having special editions.

It is worth noting that Dubai is the only Arab city to host a major book festival, and Asala Publishers usually sell books for the hosted authors through our distributor, as the festival has its own lists of authors to invite. The distributor usually asks for fewer than a hundred copies, a strikingly low number when compared to the thousands of copies that best-selling authors in the UK for example can sell in festivals, as discussed before.

Asala Publishers' Stories of Success

It is worth noting that Asala's marketing team have recognized the importance of placing books in book fairs on tables. Books that are displayed on tables sell more than those displayed on stands, giving them the priority as a marketed group. Teachers usually request a limited number of book samples to place on the summer and/or winter reading lists, and the books that are chosen by the marketing team and sent to the schools usually have better chance at being selected and sold in quantities. The marketing team also recognized the importance of the books that discuss topics already in the curriculum, which teachers use.

Conclusion

The UK market is a very well developed one, which is clearly reflected in the sales figures, print runs, and the variety of marketing techniques employed. Having a dedicated marketing team in the UK's big and medium-sized publishing houses is reflected in their innovative marketing techniques, ranging from the classic word-of-mouth and use of traditional media like TV and radio, to the fast-developing use of social media and online competitions. It is worth noting that marketing children's books in the UK is strongly influenced by the lifestyle of readers who buy books from bookshops, supermarkets, and online; are involved and interact with social media; and are affected by word-of-mouth. Marketing children's books in the UK is also affected by the nature of the publishing companies, which have budgets allocated to marketing, the will to experiment and apply and adapt marketing techniques, in addition to the possibility of studying the effects of marketing on sales. Applying the British marketing techniques in Lebanon has shown that the Lebanese market is totally different from the UK one. Methods that have proven successful in developed markets did not yield positive results on sales in the Lebanese market, and the many stakeholders were very reluctant to accept changes. Most of the marketing methods add to the costs of selling a book, which might be one of the reasons for the minimal experimentation in marketing children's books in the Arab World. Applying changes in publishing and marketing has proven to be difficult in Lebanon. The only method applied that yielded positive results was adding promotional items to books (especially in school book fairs where the customers are the consumers themselves, i.e. children buying books for themselves).

With all the political and economic problems in Lebanon applying a new element of change was not easy. This is due to many factors including the fact that the book business is still developing. In publishing houses the number of employees working in marketing or sales (discussed previously in Chapter Two) is limited, the teams in publishing houses have mixed roles, and many people working in publishing do not have the appropriate qualifications. There is a limited number of bookshops, struggling to survive, and selling stationery with books (discussed previously in Chapter One). The nature of the Arab children's book customer who is in many times a non-enthusiastic reader, non-experienced in book purchases, and struggling with everyday life affects the development of the publishing sector. The nature of the Arab market itself is different from the Western markets. This research has revealed the large differences between the markets, the need to work on marketing methods that can fit the Arab market (which relies heavily on book

fairs and schools), and the need for further studying and applying new marketing in the Arab book market and testing the results.

Conclusion

The aim of this study has been to research the factors affecting the marketing of children's books in the Arab World, to better understand children's book customers there, and to investigate the marketing techniques needed to develop the children's book publishing industry. The study began by researching the available literature, addressing reading and publishing in the Arab World, then continued to study factors affecting publishing, the children's book publishing industry, the importance of book fairs in the Arab World, children's book customers in the Arab World, and book marketing in the UK. The research then proceeded to apply marketing techniques that have been successful elsewhere, in order to test them. The whole study aims to make an original contribution to the literature on Arabic children's publishing.

This Conclusion will first summarize the findings from the study's earlier chapters. Section two will provide deductions based on these findings and will highlight my personal opinions, and the limitations of the research. Section three will discuss comments about the future of the children's publishing industry in the Arab World, the implications of this work and recommendations for future research.

Chapters Overview

The Arab World is united by language and a common culture that differentiates it from western countries. Although each of the Arab countries is unique, there are characteristics linking them. Obstacles facing children's book publishing are also common among the Arab countries, including low reading levels, the data deficit, and distribution problems. Researching children's book publishing in the Arab World is of high importance since it adds to the body of knowledge available and helps in developing the children's book publishing industry. As discussed in the **Introduction**, children's literature is crucial in helping children adapt to the changes buffeting the Arab World, where children face traumatic situations and/or the need to adapt to developmental changes.

My research explored the different bodies of literature available on authors and illustrators, publishing in general, children's book publishing, reading, and distribution. The researchers varied in the ways they dealt with these topics, ranging from very small specific studies (for example Bashour, 2010) to larger ones (for example Arab Thought Foundation, 2010), though only covering part of the Arab World: Lebanon, UAE, and Egypt. Researchers agreed on the mistrust between authors and publishers, the available translation funds, the underdeveloped departments in publishing houses that mainly rely on

the owner, the problems facing distribution, and the important role that book fairs play in the Arab World. Almost all of the studies discussed in the **Literature Review** agreed on the main problems surrounding publishing in the Arab World and arrived at similar conclusions. The research into the existing literature explains the use of traditional and limited marketing techniques and distribution channels in the Arab World. Researchers agreed that: there are few studies in the Arab World discussing publishing, reading, and the book industry; that Arabs are not enthusiastic readers, which hampers the publishing industry's development; the traditional methods used to teach Arabic language need to be revived and modernized; and there are specific barriers on book movement and slow mobility of books in the Arab World (to reach readers). Distribution in the Arab World is weak due to the limited use of ISBNs, piracy problems, censorship, limited marketing diversity, late payments, and the limited number of bookshops (which are mainly located in the big Arab cities). The problems facing distribution in the Arab World result in more emphasis on book fairs as the main sales channels to the public. The limited use of ISBNs and the weak distribution channels constrain the marketing Arabic children's books receive, which highlights the need to further study children's book publishing in the region.

As a researcher looking at publishing children's books in the Arab World, I determined that to truly understand the issue required looking not only at the publishing houses themselves, but also their customers, while also studying the marketing techniques used and the different markets they address. Due to the small body of literature available, the research employed different methods, both qualitative and quantitative. The **Methodology** discussed how I conducted this research. The fact that most government ministries, publishing unions, NGOs, publishing houses, book shops and some book fairs do not generate their own statistics made it harder to access data and get accurate numbers on which to base the research. I thus had to generate data through questionnaires, interviews, fieldtrips, and applying marketing methods. Each method used had its advantages and limitations. Some interviewed publishers, ministry personnel, and customers, were hesitant to share information, and often left some questions unanswered or incomplete, or did not provide numbers. My experience in collecting data reflected the small number of figures available, and the struggle a researcher can face in data collection in this region.

The scarcity of data is due to many factors, some from the publishing houses themselves, and others stemming from the socio-economic situation and the markets. **Chapter One** discussed the factors surrounding and affecting children's book publishing in the Arab

World. Publishing and publishers exist within a frame of situations and factors that play a major role in shaping the industry and the way that publishing is conducted, starting with the publishing house itself and moving to the country and region. The fact that most publishing houses in Lebanon are family businesses affects the way decisions are made, and perpetuates traditional business practices. Publishing houses in Lebanon have diverse publishing lines, range in sizes from several employees to tens of them, and mostly rely on the owner for the decisions, sales, and copyright deals. The relationship between Lebanese publishers and authors and illustrators is distorted by a severe lack of trust. In addition, it is only recently that translation funds have been available to Lebanese publishers. The mixed roles that members play in the book chain affect trust and the development of the publishing industry. The weak network of trade associations in Lebanon and the Arab World and the problems around the teaching of Arabic put more constraints on development. The children's publishing industry is hampered again and again by the political and economic problems the country has faced for decades. Book publishing and marketing in Lebanon is affected by the lack of existing statistics and studies, an unstable political situation, the book chain, the outsized role that book fairs play, weak distribution networks, widespread piracy, the extensive regulations that governments put on books, and the slowly changing market. These factors combine to affect the development of the publishing industry in Lebanon.

These factors affecting publishing in Lebanon are shared by all publishers in general, and children's book publishers specifically in the country. **Chapter Two** provided an overview of Lebanese children's book publishers, in order to understand that aspect of the country's publishing industry. Part one of the chapter highlighted the differences between publishing houses in total number of employees, employees working in marketing, titles published, print runs, and specialisation. The number of employees ranged from 50 at Dar Al Ilm Lilmalayin (which published a maximum of 36 children's books in 2007), to ten employees in Al Maaref (which has published 300 children's books in 2010), to two in Yuki Press (which has published six children's books in 2010). Most publishers published picture books and reading series, reflecting the importance of school markets and schoolchildren visiting book fairs.

Each of the children's book publishers concentrated their sales on different markets, again displaying the differences between houses. However, most publishers target the Gulf States due to their higher individual purchasing power and political stability.

Publishers sell mainly through book fairs, schools, and a few distributors; and these selling channels affect the marketing techniques used. For instance, Lebanese publishers rarely use media like television and radio to the extent these marketing techniques are used in the UK and other developed markets, and when used have minimal effect. “Topic” and “price” were chosen by Lebanese children’s book publishers as the main factors affecting book sales. The publishers view distribution as the main obstacle to publishing in the Arab World. When asked about their future plans, most publishers chose publishing a new genre of books, reflecting the change that might happen in the market throughout the coming years.

The markets and customers have a great effect on the books published, and the marketing methods used. Markets in the Arab World differ greatly, including both developing markets in the Gulf and struggling ones (due to political instabilities) like Lebanon. **Chapter Three** provided a study of the Gulf market through a series of surveys in five Gulf book fairs: Kuwait (Kuwait), Qatar (Doha), Oman (Muscat), and the UAE (Abu Dhabi and Sharjah). The results reflect the nature of the rich Gulf States with high individual income rates. The typical children’s book customer in the Gulf States book fair is a young mother (mainly in her twenties and thirties) buying picture books for her elementary school-aged children. The children’s book customer in the Gulf States focuses on topic and believes that books help children to love reading, and buys from book fairs.

Development in the Gulf States is reflected in book purchases, government orders, and expanding book fairs. The Gulf States have few public libraries in addition to a relatively small number of bookshops. These factors put more emphasis on the book fairs as an opportunity to buy books and browse new titles from publishers from different parts of the Arab World. Most of the Gulf States covered in the research have small populations and relatively high income rates when compared to the other markets, making them attractive to Lebanese and other Arab publishers alike. The importance of book fairs in the Gulf States is reflected in the Arab publishers’ high rates of involvement in the fairs, the high number of visitors, and the sales figures provided by some book fairs like Sharjah and Abu Dhabi.

The development in the Gulf States is not matched in other Arab markets struggling with political and social instabilities. **Chapter Four** provided a study of Lebanon, Tunisia, and Algeria, and discussed the results of the customers’ questionnaires in those countries’ book fairs. Section one of the chapter discussed the Beirut International Book Fair, where

Lebanese publishers project their image by the size, location, and decoration of the book fair stands. The Beirut fair's success is highly dependent on the political situation and the weather. The typical customer in the Beirut International Book Fair is a mother buying picture books for her elementary school-aged children. Book fairs and public libraries are the two main sources for customers to find out about new titles, while most purchases are made in the book fair. The customers in Beirut Book Fair look for the topic of the book in order to help their children learn the Arabic language and develop a love of reading.

The other sections of the chapter discussed the results from Tunis International Book Fair and Algiers International Book Fair. Like the other Maghreb states, Tunisia and Algeria are bilingual with a large emphasis on French. Individual income rates in both country are very low compared to the Gulf States, which affect the sales of Lebanese children's books there. A typical children's book customer in the Tunisia and Algeria is a female, (mother or relative) in her thirties buying picture books, looking for the topic of the books, finding out about new titles from book fairs and public libraries, and buying books from book fairs and bookshops. The main reasons behind children's books purchases are to promote the love of reading and help the children know the language.

The fact that bookshops in these countries are not widespread again puts more emphasis on the importance of the book fairs as a selling channel. While the number of visitors and purchases are not available from the fairs, the number of Lebanese children's book publishers taking part is much lower than the book fairs in the Gulf States.

The results from all the book fairs are combined and analysed in four sections in **Chapter Five** in order to better understand the Arab children's book customer. Section one compared the Arab book fairs to international book fairs, stressing the role that the former play in selling directly to the end customer. In contrast, book fairs in other parts of the world are often intended for business customers and business deals only. Section two presented the combined results from all the book fairs, together stressing the importance of targeting the typical Arab World book customer: a woman in her thirties buying picture books in book fairs for elementary children to promote the love of reading.

Section three analysed the questionnaire results and identified links between variables. The results highlighted the small differences available between purchasers from different genders; the fact that teachers intend to buy books for elementary school-aged children; the importance of price in the Muscat and Beirut markets; the respondents choosing publisher

as a criterion are mostly in the Beirut market and want to purchase picture books; teachers, mothers, and relatives primarily buy picture books and find out about new books from book fairs; and the customers buying books for different age groups buy books to promote reading.

Section four of the chapter compared the results from the Gulf States to those from the other markets. The results highlighted the small differences between the purchasers' ages in both areas; small differences between children's ages in both areas; the higher percentage of parent customers in the Gulf; the importance of topic as a criterion for book selection in both areas; the similar results in purchasing picture books in both areas; the higher role that public libraries play in non-Gulf markets in presenting new titles; the similar results of places of purchase, with higher results of purchases made in bookshops in the non-Gulf market; and that the reasons behind purchases from both areas were to promote reading, with higher percentages in the non-Gulf markets of customers buying books to develop the child's imagination.

Customers in the Arab markets are very similar in their purchasing habits and reasons behind purchases, but they are very different from the UK customers. This is reflected in the marketing techniques used to reach customers in the UK, which are not applied in the Arab World. **Chapter Six** presented some successful marketing techniques applied in the UK market, a mature book market where marketing plays a central and crucial role in publishing. Marketing children's books in the UK is done through engaging customers and communicating through social media. The Book Marketing Society awards for best marketing campaigns in 2011 and 2012 were for campaigns that engaged the reader. To market children's books in the UK publishers use a variety of methods, including both traditional and innovative techniques. The marketing methods used in the UK include traditional word-of-mouth, social media (Facebook and Twitter), competitions, television, printed material, rights catalogues, special editions, bookshops and special offers, book signing events, book festivals, special editions and promotions, promotional items, supermarkets special editions, marketing to schools and school book-clubs, and marketing to institutions. In an attempt to experiment with the Arabic children's book market, some successful techniques used in the UK were applied in the Lebanese market. The process stressed the difficulty of changing the traditional way business is run in the Arab World. It was difficult to push bookshops and outlets to try new techniques and introduce new methods that might add more work to the bookshop personnel. Special offers and extra

promotion on prices were the most successful techniques, while social media still needs greater experimentation, since the results are usually slow in the Arab World.

Analysis of Core Findings

The research has displayed the traditional Arab publishing industry in most of the region, and alongside the developing Gulf markets and a range of book fairs. The traditional publishing industry has inherited the same systems from previous generations, relying on owners and on personal relationships for marketing and sales. The problems are rooted in culture and society, the limited available research, scarce funding for the promotion of reading, slowly developing methods used to teach Arabic, the inherited non-specialised publishing houses publishing more than one genre of books for different age groups, and distribution problems. The Arab World is a large market with many similarities among its constituent countries, especially the conservative Islamic culture that emphasises tradition. The research has also recognised differences in the Arab markets, especially the fast changing Abu Dhabi market and the slowly changing Algerian one. The publishing industry will change within the coming years, but with a different momentum of each country's internal markets and political situation.

In order to develop children's book publishing and marketing in the Arab World, more research and documentation needs to be done. Specialisation should be encouraged in order to create trust between the players in the book chain; distributors would develop their distribution systems, publishers develop their specialisation lines and marketing techniques, and bookshops concentrate on developing their marketing and display opportunities. Specialisation can be developed when publishers, distributors, booksellers, and authors divide their efforts and/or team members, (which are usually small compared to British companies, as discussed previously in Chapter Two), according to their specific duties like handling sales, marketing, professional development, and distribution. As a result, the tendency to rely on "safe" and "known" methods which hinder development, and experimentation in the publishing industry can change. The industry is greatly limited by the fact that authors are at the same time publishers; publishers are distributors; distributors are publishers; publishers are bookshop owners; bookshop owners publish; institutions publish; publishers open several publishing houses; and publishing employees start publishing houses. Profit margins are affected by a great number of factors, including stability and payment problems that place more limitations on the publishing houses' ability to invest in marketing and data analysis. In addition, the fact that publishing is an

inherited business whose practitioners wear many hats, affects the outcome of attempt at progress. Surrounded by political strife, payment problems, trust issues, distribution problems, and piracy, the Lebanese children's book publisher too often sticks to the "safe option" of doing business in the same way as it has been done for many years.

The research highlights the need for publishers to move towards a market-led approach and a more strategic view of marketing. This would include analysing customers' needs and values, and developing marketing techniques to meet those needs. The more specialised the publishers are, the harder it would become for others (like authors, employees, and bookshops) to enter into the field. As a result, trust can be established again between the different players.

The research has examined the factors and circumstances around publishing and marketing in the Arab market, analysing the book fairs and book customers, presenting the developed marketing approaches, and applying new methods. Like most of the other Arab World studies, this project highlights the limitations and the need for further study. I have been limited by the political instability and safety in some Arab markets, the nature of the conservative customer, and the lack of time and ability to apply to test more marketing techniques over a longer period of time.

If we go back to Chapter Six, Blyth (2009, p. 6) defines marketing as "a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and values with others". What is clear in this definition is the importance of "values," "needs and wants," customers, and "market research" (Blyth, 2009, pp. 7-8). It is worth noting that Arab values are substantially different from British and Western values, the needs and wants of Arab customers differ, too, since they stress the value of topic and interacting with book-sellers at book fairs. In addition, market research in the Arab World is very minimal. These differences, and many others, explain the failure of the British marketing techniques in the Arab World, and the need to create and develop marketing methods with Arab customers in mind.

When the results from the semi-structured interviews (in Chapter One) are compared with the results from research and questionnaires completed with the publishers (in Chapter Two) and book consumers (in Chapter Three and Chapter Four), and then analysed, synthesized, and evaluated, it becomes clear that slow development and traditional nature of the market is strongly rooted in the industry. All the results coincide on the traditional publishing industry and the fact that customers are accustomed to it. Book fairs play a major role in the Arab markets and bookshops and distributors play a smaller role. Drastic

changes are most probably not happening in the Arab market in the near future. However school book fairs are developing into a major source of revenue for some publishers because customers and publishers are used to the book fair model.

The Future

Children's book publishing has a distinct role in wider socio-economic development (as discussed previously in the introduction). Many Gulf States allocate high budgets to develop education, and have recognized the role that children's books play.

In the future:

- Book fairs in the Arab World will keep their selling nature due to the nature of the Arab customer and the importance of human interaction and personal relationships in sales and business and the continuing efforts by most book fair managers to develop the fairs by seeking more international involvement (discussed previously in Chapter Three). As a result, publishers will rely on book fairs to sell in the Arab markets, ship books to distributors, and network with customers. The fact that book fairs will develop will most probably limit the development of other book-selling outlets mainly bookshops and online sales channels.
- Public libraries and school libraries will most likely be developed in the Gulf States (as part of their development plans in the different states, discussed in Chapter Three). In addition, public libraries might be rebuilt and expanded, as part of the development procedure after the war is over, in the other Arab countries. Public libraries development would increase book orders in the Arab World benefiting publishers.
- Graded reading series will play an important role in the future, due to the increased awareness on the importance of practising reading and the role of the Arab Thought Foundation programme. This initiative has been categorizing Arabic children's books into different reading levels, developing criteria for presenting books in the classrooms, and recently increasing purchases of graded reading series (discussed previously in the Literature Review and Chapter Two). Lebanese publishers will be publishing more graded reading series and publishers with developed ones will benefit from increased sales.
- The changes in Syria will have a great influence on publishing there, with many publishers now operating from the UAE, thus increasing their costs (and prices). This will make them less competitive in price to their Lebanese competitors, (as

discussed previously in the Literature Review and Chapter One), who might benefit from having higher quality production but with similar prices.

- The transfer from one publishing generation to another, based on previous experiences (discussed previously in Chapter One), sometimes changes the publishing houses' lines of publishing, sales, and marketing. As a result, in the coming ten to twenty years changes will take place in many publishing companies.
- Social media have contributed to large changes in the Arab political situation, but fewer changes have been recognized in publishing and marketing children's books. Social media's effects on children's books will be more evident in the coming years, highlighting the need for more research on the use of social media to promote reading and books. Lebanese children's book publishers will continue to experiment and market via social media, which is cost effective and can have a wide reach.
- The effect of e-book publishing on paper publishing and publishers in the Arab World is still not recognizable (due to the few statistics and data available, the minimal experimentation of Arab publishers in the domain, and piracy fears) (discussed previously in the Literature Review), but in the coming years more publishers might experiment with publishing e-books or at least ensure that existing titles have e-version.

The effect of war on the Lebanese publishing industry is great restricting development. For example, during the 1982 Israeli invasion of Beirut, the warehouses of Dar Annadha Alarabiya, a publishing house owned and operated by my father, were bombed. My mother regularly recalls how my father's priority was to rescue the printing plates from inside the burning warehouses. The incident occurred at unprecedented cost to the publishing house and to my father's business. He found that having built the publishing firm from scratch over many years, he had to start all over again to rebuild his business. The incident left him in financial distress despite the will to renew his efforts and start again, but the strain of it all also left him with diabetes.

The diabetes was debilitating, forcing my father to cease work, meaning he was effectively under siege during the worst of the civil war fighting. Ever resilient, he found a solution by moving his office to the same building where we lived. At the time, an office was a necessity for business since most of the work relied on faxes and international phone calls. By contrast, today computers and the internet access allow work to be followed up from almost anywhere. In managing Asala Publishers, a contemporary publishing house in

Lebanon, I can conduct much of my business remotely, sending emails, following orders online, and calling customers through mobile phones. When political instability makes it difficult to reach the office, I follow up work from home. However, there are limits to what can be done on a screen. Unlike finance, for example, book publishing is linked to the business' physical location. Finding available book stock and warehousing is an essential part of my children's book publishing business; our location and connections to the rest of the Arab World mean that war and political conflicts can severely disrupt operations. When we need to receive new editions, manage our stock, and ship book orders; physically reaching our warehouses is crucial. I still run Asala Publishers from Lebanon because of our established warehousing system, experienced team, and family ties; I prefer to stay there because of these important links. However, land mobility through Syria, and the Occupied Palestine Territories is always at risk, making air or sea shipments often the only option despite their inconvenience. In the future, the Lebanese publishing industry will still face problems due to the wider political and economic situations.

The research has shed a light on publishing children's books in the Arab World, and analysed both the publishers and the customers. This project will add to the body of knowledge, aid the people in the decision-making process work on further development, might encourage publishers to try new marketing techniques, might encourage book fair managers to seek more research into customers, and will present a better understanding of Arab children's book publishing and customers to foreign publishers targeting the Arab developing market. The research has presented many ideas that researchers can build on to start new studies, including the need to research further the nature of the customer and the publishing industry.

Many analysts and researchers analysed and discussed the future of the Arab World highlighting the changes that the Arab World will go through in the future with the oil price changes, the Arab Spring, and political changes highlighting the need for development. Michael Hanna (2013) has discussed the unpredictable future of the Arab uprisings, specifying seven pillars to measure and help in future progress.

They are: economic growth and equality; education policy; security-sector reform; transitional justice; decentralization; the development of regional norms on democratization; and—in many ways, the linchpin for everything—the flourishing of a more pluralistic politics

Researchers expect the Arab population to continue to grow in the future, with the possibility of a larger children's book market. However, along with expanded opportunities, more people would also exacerbate serious problems, including water issues.

In her article “Water More Important than Oil for the Future of the Arab World”, Sima Bahous (2013), the Director of the Regional Bureau for Arab States UNDP, stresses that the Arab World will be facing serious water problems which is now the “immediate challenge”. “The population of the Arab world tripled from 128 million people in 1970 to over 360 million today. And United Nations projections show that the region's population may nearly double again, to 634 million by the 2050”. The results reflect a growing market but at the same time upcoming problems hindering development.

Simon Henderson (2014), in his article “Understanding the Gulf States” in The Washington Institute, expects changes in the Gulf States. The Gulf States

have only been nation-states for a few decades yet their immediate future, what with an almost-nuclear Iran and the turmoil of the “Arab Spring”, is uncertain. To make matters worse, the trend line is bad. Ten, or more likely twenty years ahead, there is predicted to be an energy glut in North America (Canada, the US, and Mexico) this will hammer oil and natural gas prices. So what if, collectively, you have more than 30% of the world's oil and more than 20% of the world's natural gas? Lower prices would certainly be to the benefit of the developed world but probably a disaster to the relatively undiversified economies of the Gulf Arabs...There is a major “but” in this sweep of analysis.

Change is the only constant element in the Arab World, and marketing children's books is part of this vast changing market that is facing and will face developments in some areas and big delays in other non-stable areas. The challenge, as Arab publishers, governments, leaders, NGOs, and book-sellers, will be to prepare for these changes and use them to their advantage, so that the children's books industry may grow and improve.

This research contributed to knowledge through presenting new theories on the Lebanese and Arab publishing industries and their markets, offering practical methods for other Lebanese publishers to work on, and introducing a combination of new methods used to understand different players in the book chain process. The research highlighted the need for more research, more experimentation, and promoting reading and books as some of the main tools needed to further develop the Arab World, while helping children overcome their fears of war and deal with the quick pace and uncertain direction of development. Lebanese and Arab children's book publishers have an essential role to play in the future, through publishing and marketing children's books that can help children love the Arabic language, accept and understand other people, and learn the necessary skills to work for peace.

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Appendix A

Book Fairs in the Arab World

(Syndicate of Publishers Union, 2013)

Arab Countries Book Fairs	Dates 2013
Sana'a International Book Fair	25 September- 6 October
Tripoli International Book Fair- Libya	1 October- 10 October
Tunis International Book Fair	25 October- 3 November
Algeria International Book Fair	30 October- 9 November
Sharjah International Book Fair	6 November- 16 November
Kuwait International Book Fair	20 November- 30 November
Doha Book Fair	4 December- 14 December
Beirut International Book Fair	6 December- 19 December
	Dates 2014
Cairo International Book Fair	22 January- 6 February
Casa Blanca Book Fair	13 February- 23 February
Muscat International Book Fair	26 February- 8 March
Riyadh International Book Fair	4 March- 14 March
Djibouti Book Fair	15 March- 21 March
Bagdad International Book Fair	18 March- 27 March
Sfax Children's Book Fair (Tunis)	19 March- 29 March
Bahrain International Book Fair	27 March- 6 April
Irbil International Book Fair	2 April- 12 April
Palestine International Book Fair	10 April- 20 April
Abu Dhabi International Book Fair	30 April- 5 May
Nouakchott International Book Fair	15 May- 21 May

Appendix B

Members of Arab Children's Book Publishers Forum

(ACBPF, 2010)

publishing houses	Number
Egypt	25 Libraries: (2)
Syria	9
Jordan	7
Tunisia	4 Association: (1)
UAE	2
KSA	4
Iraq	1
Palestine	Foundation: (1)
Kuwait	Magazine: (1)
Cyprus	1
Lebanon	20 Library: (1)
Libya	1

Note: Libraries, associations, foundations, and magazines are part of the ACBPF since they publish material for children.

Appendix C

Arab Countries Purchasing Power

(The World Bank, 2014)

World Bank Purchasing Power Parity: GNI per Capital, PPP (US \$)

Country name	2009	2010	2011	2012
Algeria	7,680	7,970	8,120	8,360
Bahrain	20,590	18,910	na	na
Comoros	1,150	1,160	1,180	1,210
Egypt	6,130	6,300	6,290	6,450
Iraq	3,400	3,640	3,880	4,230
Jordan	5,820	5,750	5,870	5,980
Kuwait	49,060	47,770	na	na
Lebanon	12,680	13,340	14,000	14,160
Libya	17,430	na	na	na
Mauritania	2,280	2,280	2,300	2,480
Morocco	4,410	4,580	4,840	5,060
Oman	25,090	25,320	na	na
Qatar	72,840	77,640	80,470	na
Saudi Arabia	26,110	27,720	30,160	na
South Sudan	na	na	na	na
Somalia	na	na	na	na
Sudan	1,770	1,800	2,020	2,070
Syria	4,760	4,800	na	5,120
Tunisia	8,590	8,870	8,770	9,210
United Arab Emirates	44,710	41,550	41,550	na
West Bank and Gaza	na	na	na	na
Yemen	2,470	2,590	2,280	2,310

na: not available

Appendix D

Cost of Living in US \$

(Numbeo, 2015)

	Algeria	Kuwait	Lebanon	Oman	Qatar	Tunis	U.A.E.
Loaf of Bread	0.2	0.93	0.84	1.15	1.56	0.15	1.1
Milk (1 litre)	0.34	1.47	1.79	1.68	1.94	0.59	1.5
Rent of Apartments (1-3 bedrooms)	160- 389	722-2000	514-1900	510-1446	1554-4291	136-424	1285-3500
Internet 6MB/month	30	44.18	49.92	62.55	87.25	22.67	78
Basic Cost of Living (electricity, water, garbage...) of 85m square apartment	40	42.16	141.96	61.25	57.10	56.61	132

Appendix E

Questionnaire for Lebanese Children's Book Publishers

Arabic Children's Books: Publishing and Marketing Questionnaire

Thank you for taking part in this questionnaire. It should not take more than 30 minutes of your time to complete it. It will be used for research purposes within the Oxford International Centre for Publishing Studies at Oxford Brookes University.

A. Your publishing company

1. Name of your publishing house:
2. Total number of employees:
3. Number of employees in marketing and sales:
.....
4. Do you produce other books besides children's books? [] Yes [] No
5. Please fill in the table with the numbers of children's book titles and other books produced:

Year of publication	2006	2007	2008	2009	2010
Number of children's books					
Number of books (not including children's books)					

6. Genre/format of books produced and percentages: (Please provide both A- the number of titles you have for each genre –and B - what is the percentage of these titles that are translated from another language)

Genre/Format	A: number of titles	B: percentage translated	C: from which language/s
NON FICTION			
Illustrated information books *			
Wordless Books *			
Baby books *			
Novelty Books *			
FICTION			
Fairy Tales or local stories/myths *			
Reading series *			
Picture books (illustrations with text) up to 9 years			
Young adult (fiction) 9+			
Others (please specify)			

7. Who normally chooses the titles to be published? [Please tick all that apply]

☐ Owner ☐ Partner/s ☐ Editorial ☐ Marketing ☐ Author
☐ Production/design ☐ Others , please specify.....

B. The Market for your children's books

9. Into which countries do you think you are putting the most marketing efforts? In Column A, please rank with 1 being the most. Please provide in Column B percentages of total sales, for example, 20% in Lebanon, 15% in UAE, etc.)

Country	A. Rate (from 1 as best)	B. %age of total sales
Algeria		
Bahrain		
Egypt		
Europe		
Jordan		
KSA		
Lebanon		
Libya		
Morocco		
Oman		
Qatar		
Syria		
Tunisia		
UAE		
Yemen		
Others, please specify:		

10. What is your best-selling title or series?

.....

11. Why do you think it sells the most?

.....

12. What is your initial print run?

.....

13. How long does it need to sell that quantity (approximate number of years or months)?

.....

C: Marketing Techniques

14. What are your best-selling channels? (Please rank, with 1 being the most important)

☐ Book fairs ☐ Governmental institutions ☐ Distributors

☐ School reading lists ☐ School book fairs ☐ Bookshops ☐ Online sales*

☐ Others, please specify:

.....

15. Which marketing strategies do you use? (Please rank, with 1 as the most effective)

☐ School visits ☐ Bookshop windows ☐ Articles in Newspapers ☐ TV

☐ Radio ☐ Emphasizing titles in the catalogue ☐ Promotions on books

(special discounts) ☐ E-marketing ☐ Free samples to schools

☐ Facebook ☐ Twitter

☐ Others, please specify:

.....

16. Why do you think your no 1 strategy in your answer to Question 15 is the best?

.....

.....

17. In which of the book fairs do you sell the most? (Best-selling is 1)

Book Fair	Rank with 1 as best selling
Abu Dhabi Book Fair	
Algiers Book Fair	
Beirut Book Fair	
Cairo Book Fair	
Casablanca Book Fair	
Irbil book fair	
Kuwait Book Fair	
Muscat Book Fair	
Riyadh Book	
Sharjah Book Fair	
Tunis Book Fair	
Other book fairs, please specify:	

18. What is the most influential factor in the sales of the books? (Please rank in order of importance with 1 as the most influential)

- ☐ Price
 ☐ Topic
 ☐ Hardcover
☐ Paperback
 ☐ Small size (less than 17x24 cm)
☐ Big size (17x24 cm and more)
 ☐ Cover
 ☐ Title
☐ Author
 ☐ Illustrator
 ☐ Others, please specify:

.....

19. What are the main obstacles in your business? (Please rank them with 1 as highest obstacle)

- ☐ Competition ☐ Distribution ☐ Finding new authors
☐ Finding new illustrators ☐ Dealing with existing authors
☐ Dealing with existing illustrators ☐ Translation ☐ Discounts
☐ Payments ☐ Others, please specify

D: The Future

20. What are your future strategies?

- ☐ Publish more children's books in the same genres, such as:.....
☐ Start a new genre of books, such as:
☐ Translate more books ☐ Translate less and work on Arabic books more
☐ Publish e-books * ☐ Print more of some titles, such as:
☐ Stop a series, which series, if so:.....
☐ Others, please specify:.....

21. Would your publishing house consider using these marketing techniques in the future :

- ☐ Bookshop windows ☐ Articles in Newspapers ☐ Emphasizing titles in the catalogue ☐ TV ☐ Radio ☐ Promotions on books (special discounts) ☐ Free samples to schools ☐ E-marketing
☐ Facebook ☐ Twitter ☐ School visits
☐ Others, please specify :

THANK YOU

Thank you for your help. Your answers will be kept confidential and the analysis will be conducted to protect your anonymity.

Please return the questionnaire to 09122160@brookes.ac.uk by
Or fax it to 01 736071

For questions and inquiries about the questionnaires, please send us an email or call on 01736093

Lebanon 2010

This glossary is for Lebanese children's book publishers' questionnaire

Illustrated information books: like the books that give information for children, using a mixture of words and images

Wordless Books: books with only pictures and no words

Baby Books: books that are suitable for babies. They can be made of plastic, cloth, or small board books

Novelty Books: pop ups, glitter books, flip books, etc.

Fairy Tales or local stories/myths: like Cinderella or the Geha books

Graded reading series: series graded by level, used for beginning readers, starting with very few words but increasing in number and complexity

Picture books (illustrations with text) up to age 9: books with both text and pictures where both are highly important and complement each other

Online sales: People order the books online and they are shipped to them by companies, such as Amazon or Alneel walforat

Publish e-books: books that can be read on a screen, such as the Kindle, the i Pad or a computer

Appendix F

Questionnaire for Buyers of Children's Books in Book Fairs

Thank you for taking part in this questionnaire. It should not take more than 10 minutes of your time to complete it. It will be used for research purposes within the Oxford International Centre for Publishing Studies at Oxford Brookes University.

1. Gender: ☐ Male ☐ Female
2. Your age range: ☐ 18-25 ☐ 26-29 ☐ 30-39 ☐ 40-49 ☐ 50 and over
3. Child's age range: ☐ 0-3 ☐ 4-6 ☐ 7-9 ☐ 10 – 14 ☐ Other children age/s:.....
4. Your relationship to the child: ☐ Parent ☐ Other relative, please specify:..... ☐ Teacher ☐ Other, please specify:.....
5. What are the most important criteria when you are thinking of buying a children's book in Arabic: (please rank in order of importance, with 1 as the most important)

☐ Price ☐ Topic ☐ Hardcover ☐ Paperback
☐ Small size(less than 17x24cm) ☐ Big size (17x24cm and bigger)
☐ Eye-catching Cover ☐ Title ☐ Author ☐ Illustrator
☐ Publisher ☐ Others, please specify:.....
6. What kind of Arabic children's book/s do you want to buy at this book fair (please rank in order, with 1 as the most important)?

☐ Non-fiction (information books) ☐ Wordless Books (books with only pictures and no words) ☐ Baby books (plastic, cloth, or small board books)
☐ Novelty Books (pop ups, glitter books, flip books, etc.)
☐ Fairy Tales or local stories/myths ☐ Reading series (series graded by level)
☐ Picture books (fiction) up to 9 years ☐ Young adult fiction (9+)
☐ Others, please specify:.....

7. How do you find out about new Arabic children's books (please rank in order, with 1 as the most frequent)?

- ☐ Public libraries ☐ Schools/teacher recommendations ☐ School book fairs
☐ Adverts ☐ Bookshop windows
☐ Articles in Newspapers ☐ Publishers' catalogues
☐ TV ☐ Radio ☐ Book fairs
☐ email ☐ Facebook ☐ Twitter ☐ I do not
☐ Others, please specify :.....

8. Where do you usually buy your Arabic children's books (please rank in order, with 1 as most frequent)?

- ☐ Bookshops ☐ Book fair ☐ School book fair ☐ Toy stores ☐ Online
☐ Stationery bookshop ☐ Supermarkets ☐ Mall ☐ Others, please specify:.....

9. Why do you buy Arabic children's books (please rank in order of importance, with 1 as the most important)?

- ☐ To help/encourage the child to love reading
☐ To help the child become a proficient reader
☐ To help the child improve their knowledge of the language
☐ Because the teacher asked us to
☐ They are cheaper than foreign books
☐ To help the child get better grades in school
☐ To develop the child's imagination
☐ Others, please specify:.....

Thank you

If you are willing to answer some other questions, please give us your name and tell us how you would like us to contact you:

Name: email: Phone: Mailing address:

NOTE: the interviewer will show samples of the books

Appendix G1

Interview with the Ministry of Culture in Beirut

1. Ministry of Culture in Lebanon: the interview will seek to find
 - a. Can you please provide me with general information about the ministry:

Number of employees:
Number of employees working in different departments related to books.....
Their specialties:
The ministry's budget:
The ministry's budget related to books:
 - b. What are the institutions and/or NGOs that help the ministry in supporting children's book publishing?

.....
 - c. What are the major programmes (like the FSP) that happened in the last 10 years to support children's books?

.....
 - d. Is there a specific policy to support children's book publishing? Can you elaborate on this?

.....
 - e. How does the ministry support children's book publishing at international book fairs?

.....
 - f. Can u please tell me about any success stories that document how the Ministry has helped children's book publishing?

.....
 - g. What are the future plans or strategy for the next few years?

.....

Appendix G2

Interview with Bookshops in Lebanon

2. Bookshops in Lebanon (the major ones who sell picture books): questionnaires will seek to find

a. Can you please provide me with general information about the bookshop:

Location:

Meters occupied by the bookshop:

Number of staff:

Is it part of a chain?

Do you buy books directly from publishers or through distributors? Can you elaborate please

b. What is the space given for children's books in the bookshop (approximately in meters)

.....

c. What is the space given for Arabic children's books in the bookshop (approximately in meters)

.....

d. What activities do u have in the bookshop to promote children's book?

.....

e. What are the best-selling books in your bookshop?

.....

f. What are the best-selling children's books in your bookshop?

.....

g. What are the best-selling Lebanese children's books in your bookshop?

.....

h. What affects the sales of children's books?

.....

i. What do publishers do to promote their books in your bookshop?

.....

j. Who are your customers?

.....

k. Who chooses what to be put in the bookshop window and why?

.....

l. How many Lebanese children book publishers you sell their books?

.....

m. Which Lebanese book publishers sell the most books?

.....

n. In your opinion, how can Lebanese children's book publishers develop their work (marketing, production, and sales etc...)?

.....

Appendix G3
Interview with NGOs

3. The three main NGOs that work on the promotion of books and reading in Lebanon (Lebanese Board of Books for Young People LBBY, Iqraa, and Assabil): interviews will seek to determine

a. What are NGO's:

Mission statement:

.....

Vision:

.....

Objectives:

.....

b. How many members /board members does the NGO have?

.....

c. What are the NGO's main activities?

.....

d. What are NGO's activities that support children's books?

.....

e. Can you mention some stories of success that the NGO did that helped promote books and reading?

.....

f. Who supports of the organization financially?

.....

g. In your opinion, how can Lebanese children's book publishers develop their work?

.....